PortaBilling

Customer Self-care Interface Guide

55

Maintenance Release

Documentation

www.portaone.com

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Maintenance Release 55
V1. 55.02

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Table of Contents

Preface

This document provides a general overview of the customer self-care interface.

Where to get the latest version of this guide

The hard copy of this guide is updated upon major releases only, and does not always contain the latest material on enhancements that occur in-between minor releases. The online copy of this guide is always up to date, and integrates the latest changes to the product. You can access the latest copy of this guide at **www.portaone.com/support/documentation/**.

Conventions

This publication uses the following conventions:

- Commands and keywords are given in **boldface**.

Exclamation mark draws your attention to important actions that must be taken for proper configuration.

NOTE: Notes contain additional information to supplement or accentuate important points in the text.

Timesaver means that you can save time by taking the action described here.

Tips provide information that might help you solve a problem.

Gear points out that this feature must be enabled on the Configuration server.

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Hardware and Software Requirements

Client System Recommendations

- **OS:** MS Windows XP or above, Linux/BSD or Mac OS X 10.6 or above.
- **Web browser:**
  - Internet Explorer 11.0 or above, Mozilla Firefox 38 or above.
  - JavaScript, Java and cookies must be enabled.

- **Spreadsheet processor:** MS Excel, OpenOffice Calc, LibreOffice Calc or Google Sheets.
- **Display settings:** A minimum screen resolution of 1024 × 768.

1. Introduction

Log in to the Customer Self-care Interface

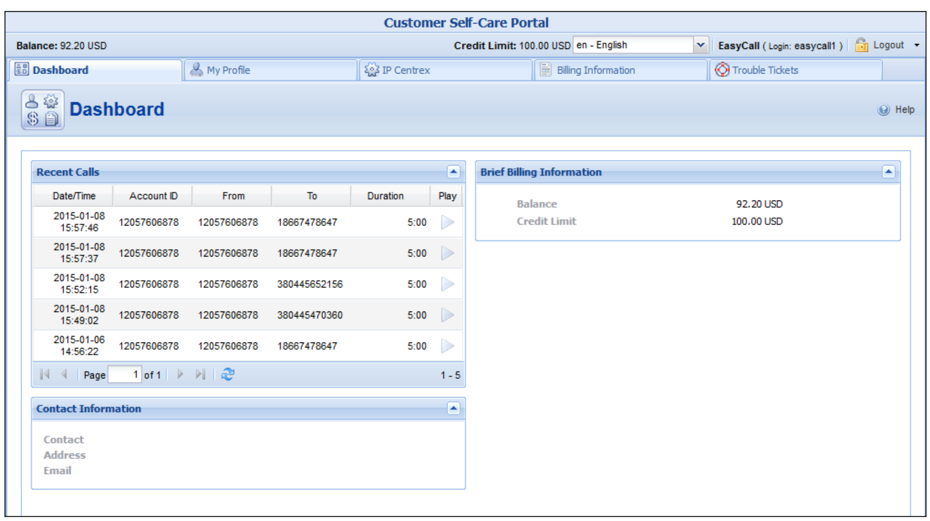
Your ITSP will provide you with a URL and credentials for logging in to the customer self-care interface upon subscribing to their services.

Overview

The customer self-care interface was designed for end users to access their profile data, check billing information, download invoices and, most importantly, manage their IP Centrex settings. The front-end design offers simple and intuitive navigation. This includes an easy-to-use structure of menus and controls, graphic icons and improved presentation of information.

For your convenience, the customer self-care interface is divided into four tabbed sections:

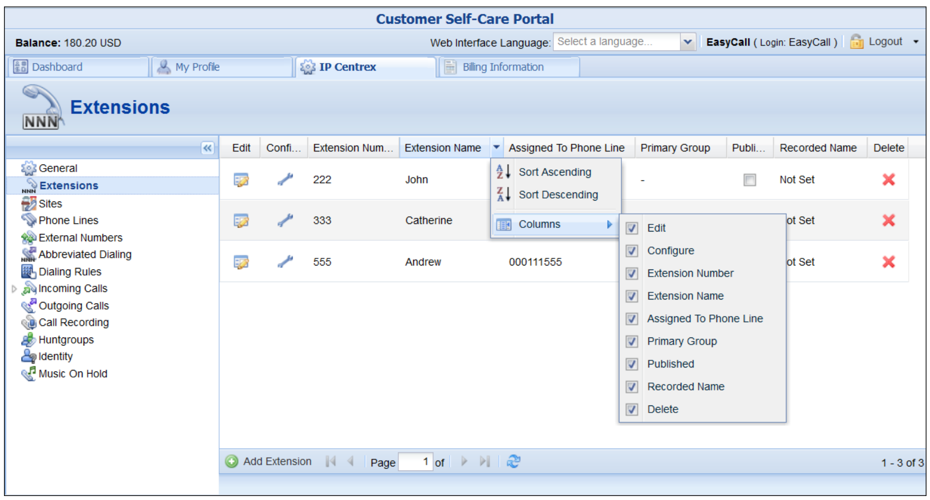
- **Dashboard** (your home page)
- **My Profile**
- **IP Centrex**
- **Billing Information**
- **Trouble Tickets**



At the top of the page you can always view billing information such as your balance, credit limit, etc.

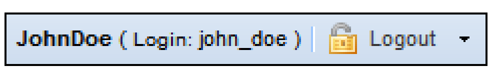
Common Features

Most of the data on the self-care interface is formatted like a page and sorted into columns. You can go to the next page or the previous page, jump to the first or last page, or use the  **Refresh** icon to update any of the pages. You can also change the number of columns and sort them in ascending or descending order by clicking your mouse on the name field of any of these columns. If you point your mouse at the name field you will see a triangle; click on it and a drop-down menu will appear. You can choose how to sort your data and add or remove columns by selecting and clearing corresponding check box in the drop-down menu:

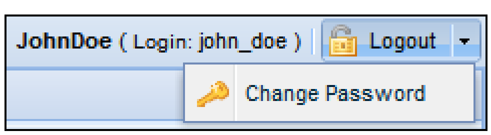


Action Buttons

The top right-hand side of the interface provides you with the following information and actions:



- Your ID and a login name that was used to log in.
- The **Logout** button that terminates your current session on the self-care interface.



Also, you can change your password here if necessary.

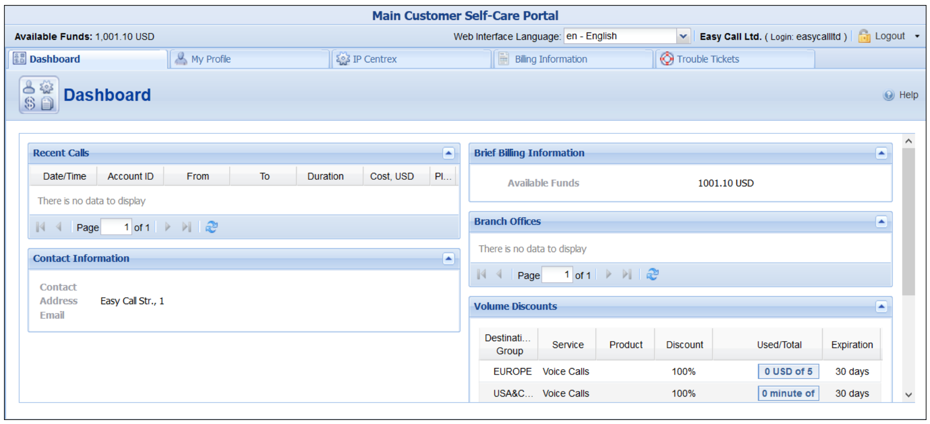
In order for changes to take effect when adding / editing information, you need to click the **Save** icon on the appropriate page. If you do not want to save the information entered – just click **Cancel**.

2. Web Interface

Dashboard

Your home page is organized like a dashboard so that you can easily view the most important information separated by category into different **information panels**. In addition, these panels can be moved around, rearranged or minimized as you wish.

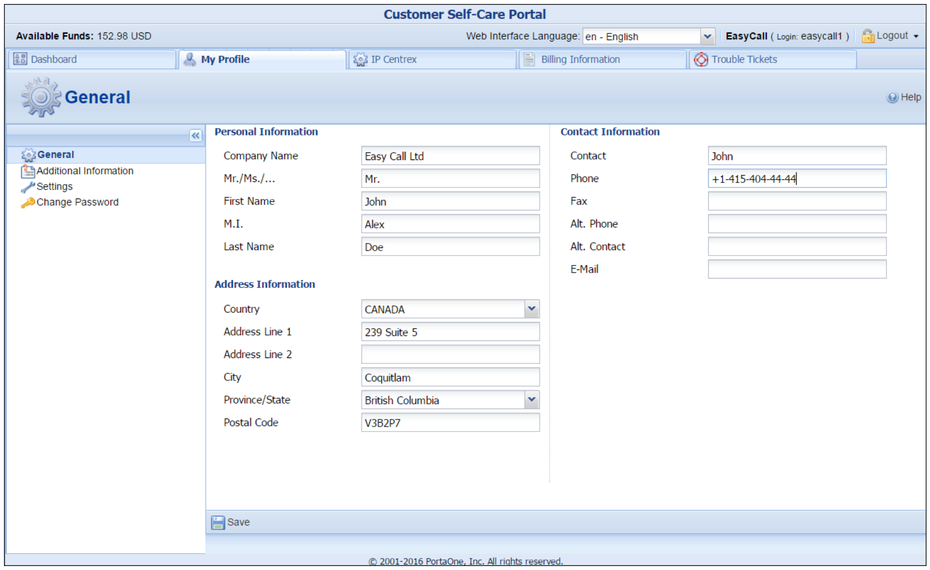
The following **information panels** may be available:



Panel	Description
Recent Calls	This table lists the most recent calls and call details generated by your phone lines (**account IDs** on the web interface).
Contact Information	Here you can view your contact info such as address, email, etc.
Brief Billing Information	This reflects thumbnail billing information such as your current balance and credit limit.
Volume Discounts	Here you can find all the necessary information concerning discounts.
Quotas and Service Wallets	Here you can find all the necessary information concerning quotas and service wallets.

My Profile tab

The **My Profile** tab allows you to view and change your personal (or your company's) details such as contact information, personal info, password, etc.



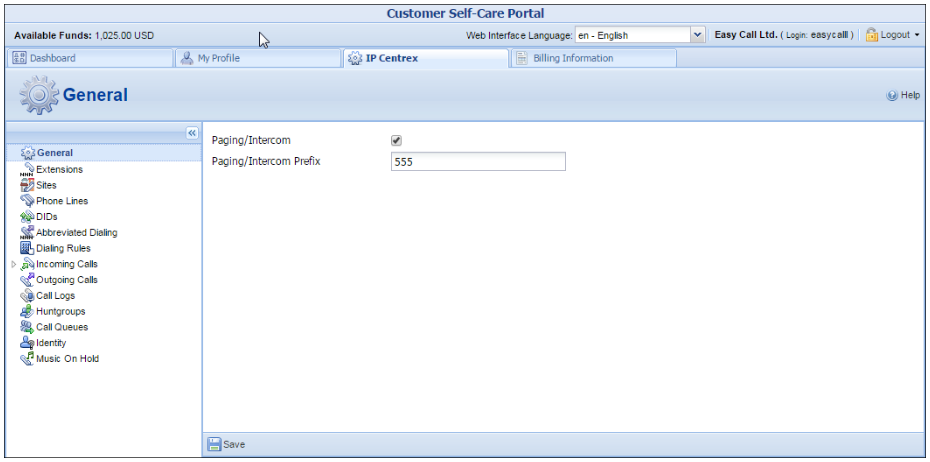
Group	Description
General	Here you can enter general information such as company name, address, etc.
Additional Information	Here you can define extra information (such as driver's license ID or tax code) in addition to standard information. The fields for this tab are set by the administrator.
Settings	Here you can choose the language to be used on your self-care interface.
Change Password	Here you can change your current password for the self-care interface.

Enter your mobile number in the **Alt. Phone** field to receive SMS notifications.

IP Centrex tab

This tab allows you to manage phone lines, add extensions and huntgroups and configure other IP Centrex services. Here you can also modify the options for separate phone lines.

General

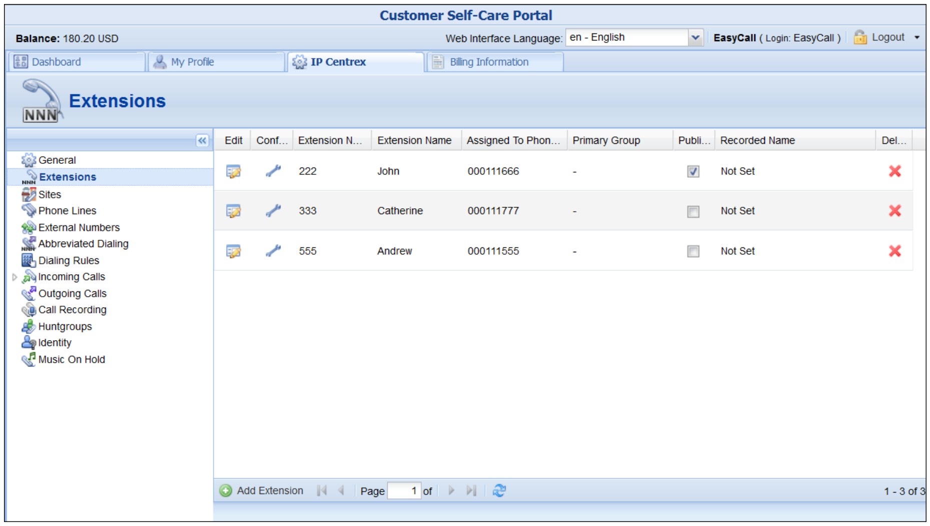


Field	Description
Paging / Intercom	Intercom calls enable users belonging to the same group to use two phones like on-door speakerphones. Here you can see whether this feature is enabled or not for your phone line.
Paging / Intercom Prefix	This appears only if **Paging / Intercom** is enabled; this is a special code that is dialed before the other extension number to automatically connect both extensions. When a two-way audio channel is established, speakerphone mode is immediately activated on the phone of the party being called.

Extensions

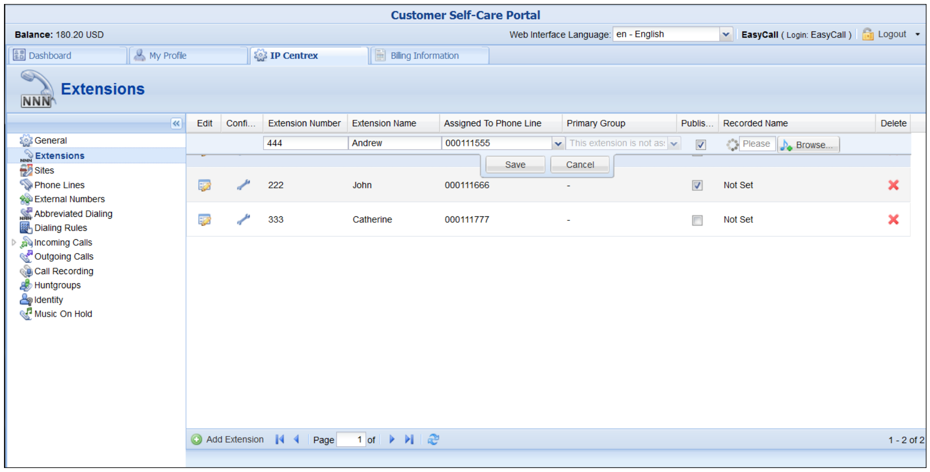
Here you can define a list of extensions for phone lines within your IP Centrex environment. You can easily add new extensions or change existing ones without any actual reconfiguration of your phone.

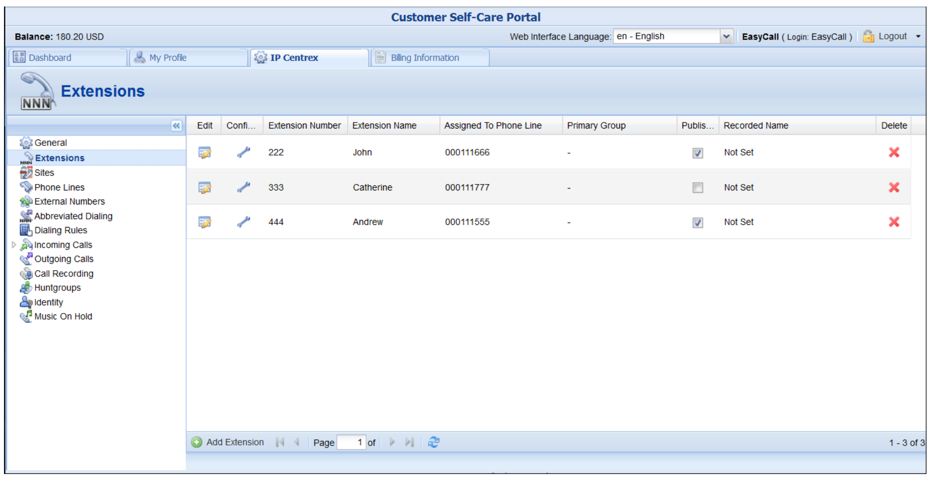
Branch Office extensions can only be added, deleted or modified on the Main Office self-care interface.



To add a new extension number, click the **Add Extension** button and enter the following information:

- **Extension Number** – Type the number the end user will dial on his phone (an extension number should contain only digits).
- **Extension Name** – Type the logical name for this extension (e.g. name of the person using this line: "John").
- **Branch Office** – Select a branch office to which the extension will be assigned. Leave this field empty for assigning the main office's phone extension. (Note that the **Branch Office** field is only available on the Main Office self-care interface).
- **Assigned To Phone Line** – This is the phone number that the extension is associated with. Here you should specify one of your phone lines by selecting it from the list. (Note that each phone line from the list can only be used once.
- **Primary Group** – Select the hunt group to which this extension belongs to allow calls within a group to be picked up by dialing the group pickup prefix (without specifying the group number). Make sure that you have assigned the extension to some hunt group beforehand.
- **Published** – Clear this check box to exclude certain extensions from being accessible via dial-by-name (e.g. you do not want tele-marketers to directly reach your CEO or CFO because their names are publicly accessible).
- **Recorded Name** – You can record or upload a voice prompt with the actual person's name for each extension. This can be used in the **Dial-by-name Directory** feature. If a caller does not know the extension number of the person he is trying to reach, he may look up the called party using the first three letters of his surname.





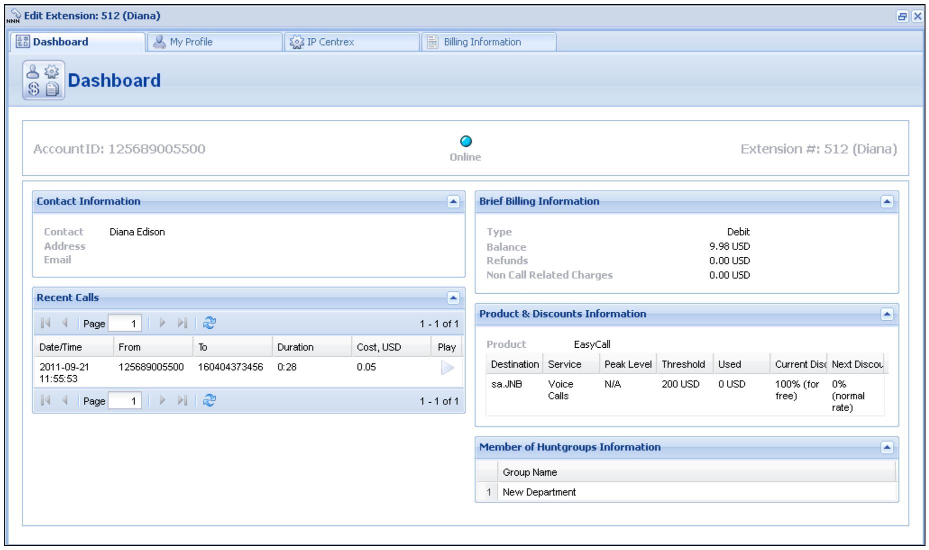
Once all the information is entered, click the **Save** button.

You can change the extension name and manage phone line assignments by double-clicking on that extension number or on the **Edit** icon.

To remove the extension from the list, click **Delete**.

Having saved the new extension, you can choose **Primary Group** this extension will belong to by clicking the **Edit** icon.

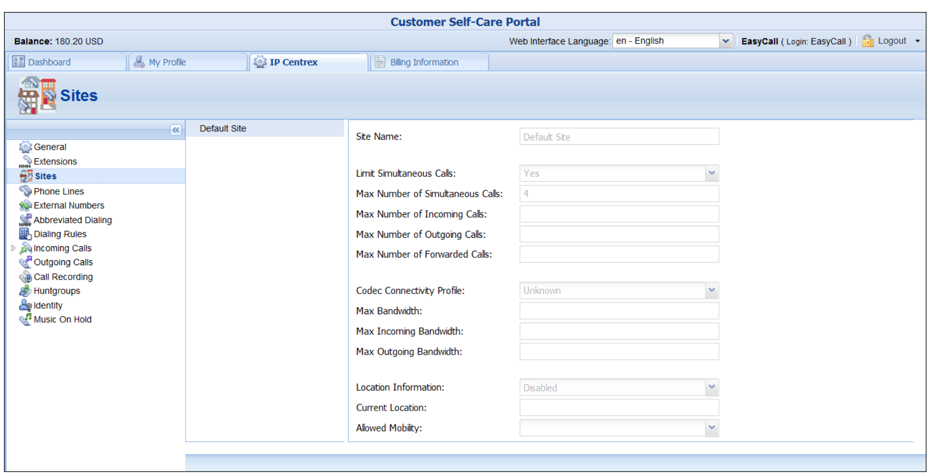
To view and edit information about the extension, click **Configure** next to the extension number. You will see the **Edit Extensions** page (note that some details are read-only).



Sites

A site is a group of customer's accounts that can be conveniently managed as a single entity. For instance, all of the phone lines used in a sales department or in 'office building A' can be joined into a single group. This allows you to apply certain configuration parameters or service restrictions to the accounts in that group. You can limit the combined number of simultaneous calls for all accounts of a particular site. This is useful if, for instance, 'office building A' has limited bandwidth and can only support 30 calls – no more calls will be allowed in order to avoid severe degradation of the sound quality on all calls in progress.

Note that even if no customer sites are created, there is the virtual default site in the system that includes all the accounts that have not been explicitly assigned to a customer site.

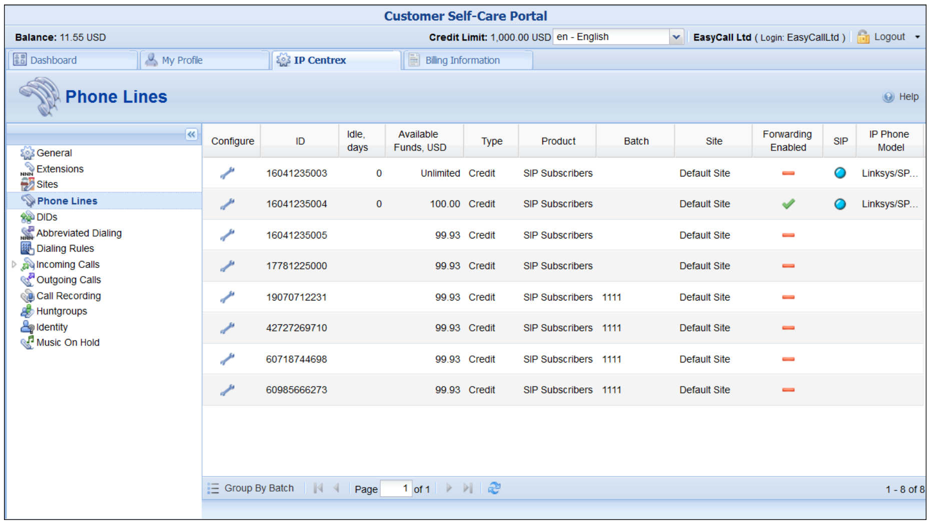


Field	Description
Site Name	Name for a group of accounts.
Limit Simultaneous Calls	Engage real-time checks of the number of concurrent calls made by accounts that belong to this site. When the specified number of concurrent calls has already been established (calls are in a "connected" state) and the account tries to place another call, that call will be rejected.
Max Number of Simultaneous Calls	Allow only a specific number of concurrent calls (regardless of their type, such as incoming or outgoing) for accounts at this site.
Max Number of Incoming Calls	Allow only a specific number of concurrent incoming calls for accounts at this site.
Max Number of Outgoing Calls	Allow only a specific number of concurrent outgoing calls for accounts at this site.
Max Number of Forwarded Calls	Allow only a specific number of concurrent forwarded calls for accounts at this site.
Codec Connectivity Profile	Codec connectivity profile that will be used for bandwidth allocation calculation. Every new call's allocated bandwidth is calculated by considering a negotiated codec and its parameters to enable full use of the available bandwidth and block new calls if no more bandwidth is available.
Max Bandwidth	Bandwidth utilization limitation to ensure that only an acceptable number of calls are allowed, in order to avoid severe degradation of the sound quality on calls in progress.
Max Incoming Bandwidth	Bandwidth utilization limitation for incoming calls.
Max Outgoing Bandwidth	Bandwidth utilization limitation for outgoing calls.
Location Information	Customer's permanent location for geo-IP fraud prevention.
Current Location	Customer's permanent location. It contains a country code top-level domain (in *iso_3166_1_a2* format, e.g. *fr* for France, *de* for Germany etc.)
Allowed Mobility	• **Stationary user (constant location)** option can be used if the customer is not authorized to make calls from various countries (e.g. as a residential customer would make calls from his SIP phone). Calls made from any other country will be screened. • The **Roaming user (frequent location)** option can be used for customers who travel frequently. In this case, a change in

	location would be considered acceptable.

Phone Lines

Here you can view the full list of phone lines and configure them if necessary.



Column	Description
Configure	Click **Configure** to edit the settings for a particular phone line.
ID	The primary identification for this phone line (i.e. account ID).
Idle, days	The amount of days the phone line has not been in use.
Available Funds	The amount of funds available for the user to spend on services.
Type	The type of phone line. It may either be **Debit** or **Credit**. Debit is usually associated with prepaid cards. Credit is usually associated with postpaid services.
Product	The product assigned to a particular phone line.
Batch	Accounts can be grouped into batches. Each batch has its own descriptive name. Here you can see the name of the batch that a particular phone line belongs to.
Site	The name of the site the phone line belongs to.
Forwarding Enabled	The forwarding field shows whether this function is enabled or disabled for a particular phone line. When it is enabled, the **Yes** icon is shown. The field with an **No** icon indicates that forwarding is disabled.
SIP	When the phone line is used by a phone to register

	with the SIP server, the **Online** icon is shown.
IP Phone Model	Indicates the IP phone that is assigned to a particular phone line.

You can also view phone lines grouped by batch by clicking the **Group By Batch** button located at the bottom of the page.

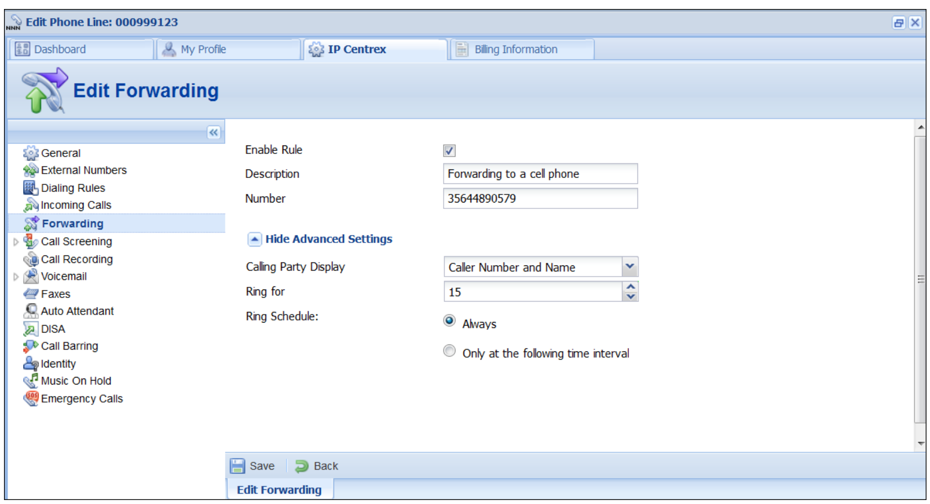
You can configure forwarding when it is enabled for the phone line. Just click the **Configure** icon next to the phone line to go to the **Edit Phone Line** page.

There are several call forwarding modes: **Follow-Me**, **Advanced Forwarding**, **Forward to SIP URI** and **Simple Forwarding**.

Follow-Me Forwarding Mode

Using follow-me you can forward calls to multiple destinations. You can also configure it so that each of these destinations will be used during its own time period.

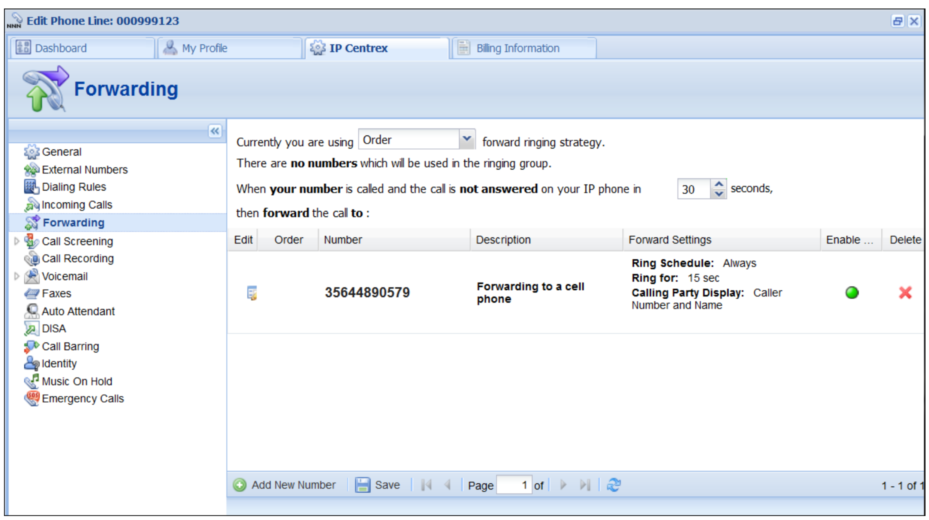
1. On the **IP Centrex** tab, select **Forwarding**.
2. Click **Add New Number**.



3. Enter the following information:
   - **Number** – Enter a number for redirecting calls (e.g. 35644890078).
   - **Description** – A short description for this number.
   - **Ring for** – If a call is not answered, set the number of seconds it will ring for until it is forwarded to the next number on the list.

- **Calling Party Display** – Choose how to display the caller's info during forwarding:
    - Select **Caller Number and Name** to see the phone number and the name of the original caller.
    - Select **Caller Number and Forwarder Name** to see the phone number of the caller and the forwarder's name (they will be displayed).
    - Select **Forwarder Number and Name** to see the phone number and the name of the forwarder.

- **Ring Schedule** – Choose the period during which the number is used.
    - **Always** – Calls will always be forwarded to your cell phone.
    - **Only at the following time interval** – If you want to forward calls to a cell phone only during a specific time period. Click the icon to define that interval. Please consult the *How* section for more information.



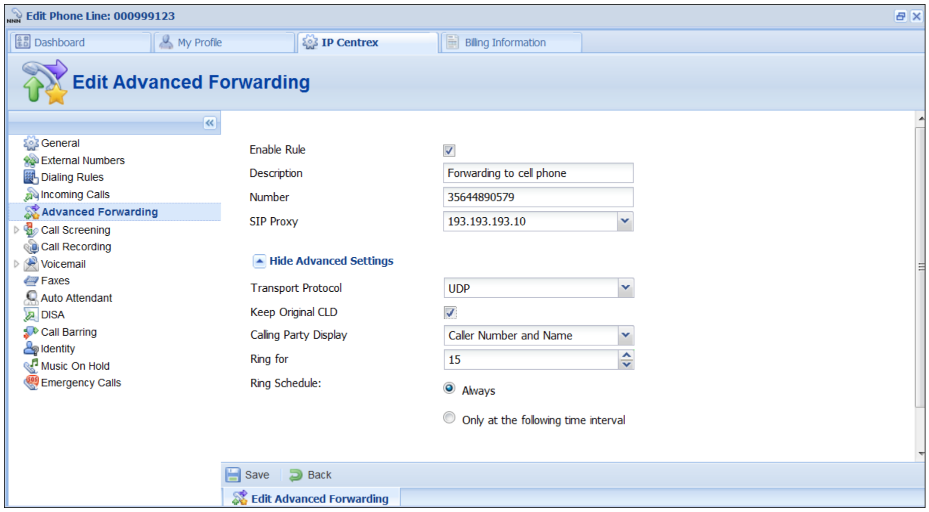
4. Click the **Save** to save the results of your work.
5. Repeat steps 2–4 until all the desired follow-me numbers have been added.

Advanced Forwarding Mode

This is similar to follow-me mode, but has a few extra options that allow you to route calls to SIP URI. To do this, follow these steps:

1. On the **IP Centrex** tab, choose select **Advanced Forwarding**.
2. Click **Add New Number** to add the number on which you wish to receive forwarded calls.

3. Enter the information needed. The fields are very similar to those for adding a follow-me number as described in the **Follow-Me Forwarding Mode** chapter.



Additional fields that are not available when adding a follow-me number:

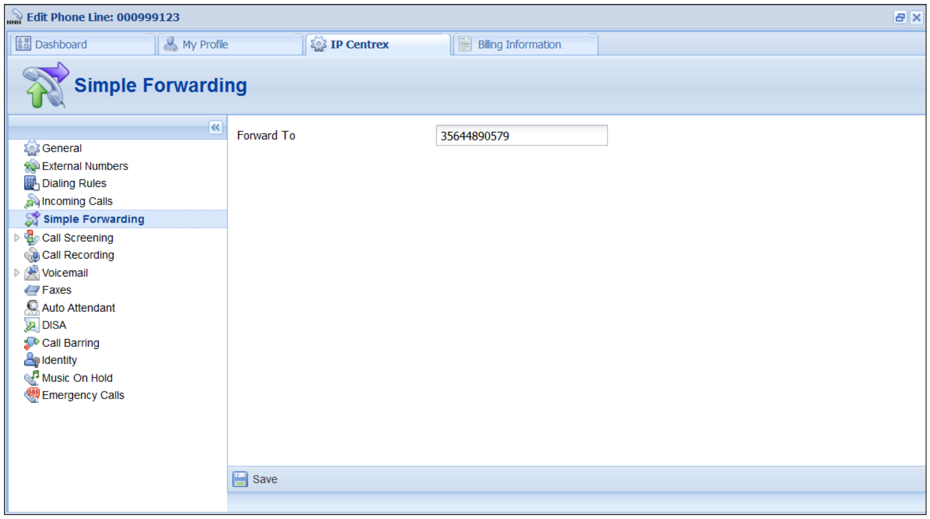
- **SIP Proxy** – Select SIP proxy from the list.
- **Keep Original CLD** – Select this check box to ensure that the originally dialed number is present in the call information when forwarding a call to another phone line.
- **Calling Party Display** – Choose how to display the caller's info during forwarding:
  - Select **Caller Number and Name** to see the phone number and the name of the original caller.
  - Select **Caller Number and Forwarder Name** to see the caller's phone number and the forwarder's name (they will be displayed.)
  - Select **Forwarder Number and Name** to see the forwarder's phone number and name.

- **Transport Protocol** – This enables you to choose the UDP or TCP transport protocol. You can use the TCP protocol instead of UDP for SIP communications for PBXes that do not support UDP.

4. Click **Save**.

Simple Forwarding

The simplest type of forwarding is when you specify a single phone number to which all calls will be sent.

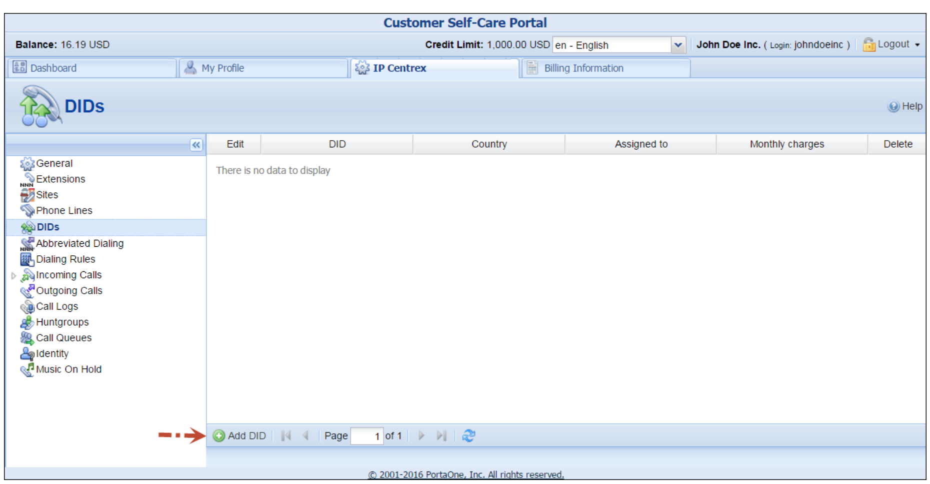


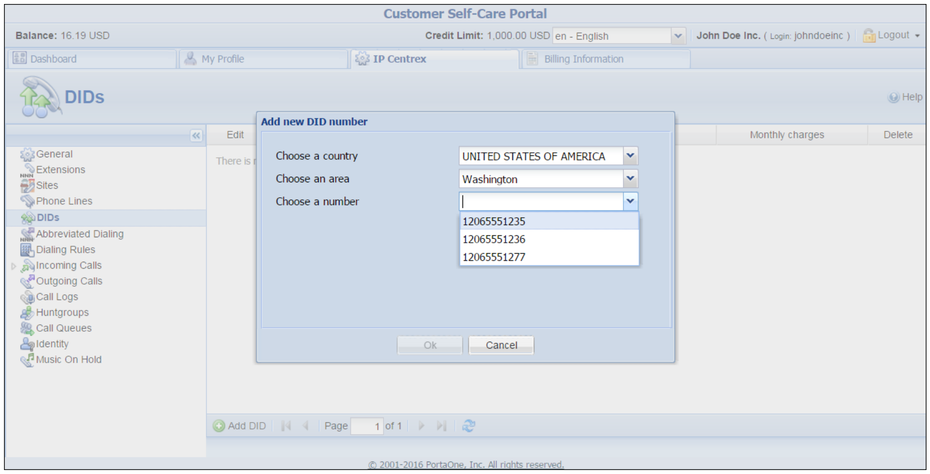
1. On the **IP Centrex** tab, select **Simple Forwarding**.
2. Enter the following information:
   - **Forward To** – The number you wish the calls to be forwarded to.
3. Click the **Save**.

DIDs (External Numbers)

On this tab you can allocate DID numbers, either provisioned on-demand from an external DID provider or via your service provider's DIDs.

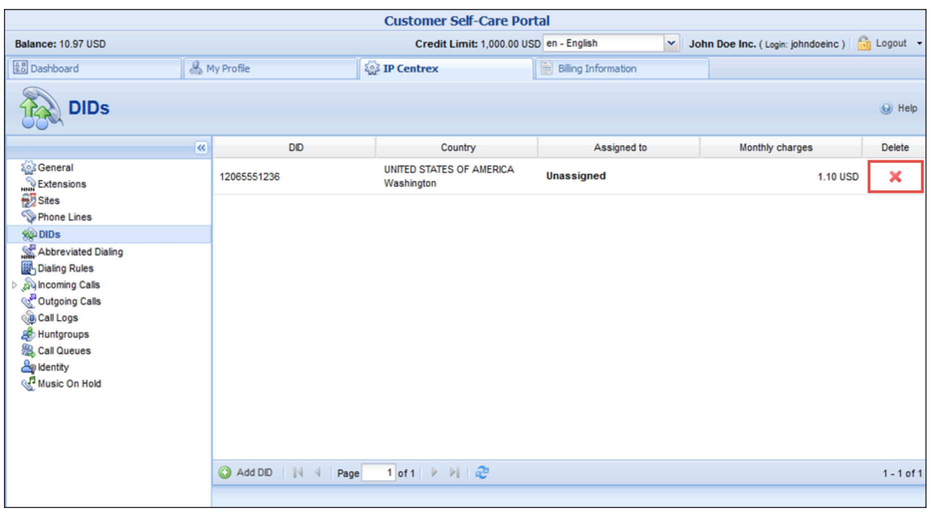
To do this, click the **Add DID** button at the bottom of the page. In the **Add new DID number** dialog box, choose a country and an area in which you want to purchase a DID, and a DID number. Once the number is chosen, you will see the applicable fees for using this DID number.





As soon as you confirm the new DID number, your number will appear as unassigned. Click the **Edit** icon to assign this number to an account (phone line).

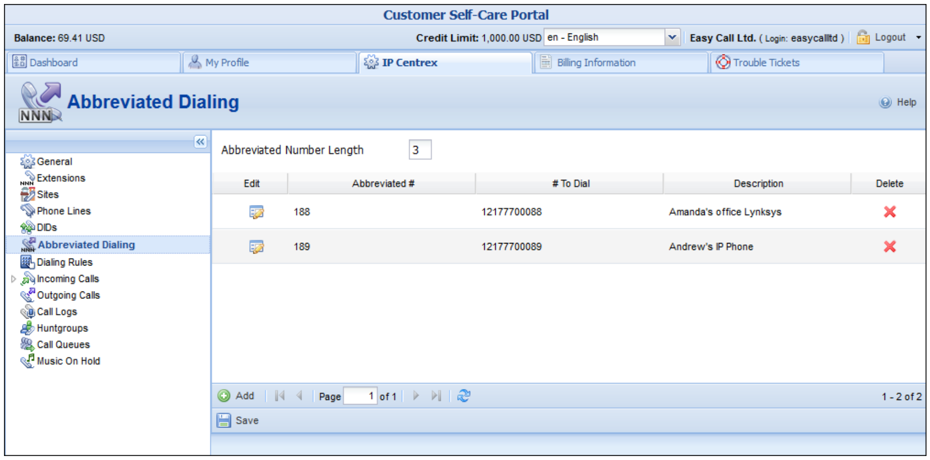
If you no longer need a DID number, simply delete it from the list of allocated DIDs. As a result, you are no longer charged for the usage of this DID number. If the DID number was assigned to an account as an alias prior to deletion, this alias is removed in PortaBilling®.



Abbreviated Dialing (also known as Speed Dial)

Here you may define a list of phone extensions for your IP Centrex environment, plus create abbreviated dialing for external phone numbers. You can set up dialing rules as an international prefix, outside prefix, direct number (e.g. 911), or abbreviated dialing for your accounts.

NOTE: To be able to add extensions / abbreviated numbers, you should enter the maximum length of anticipated digits (e.g. 3 in the case of 123-like numbers) in the **Abbreviated Number Length** field.

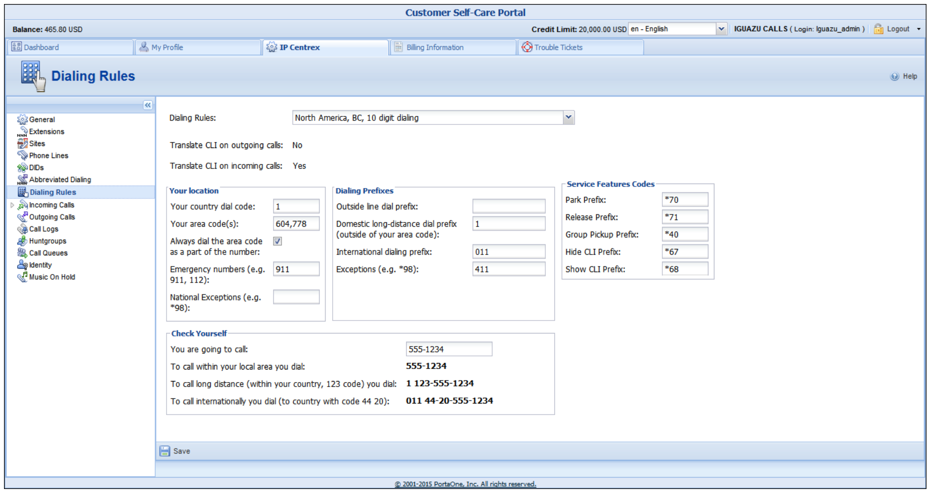


To add a new abbreviated dialing number, click the **Add** button and enter the following information:

Field	Description
Abbreviated #	The number the end user will dial on his phone.
# to Dial	The number that the call will be forwarded to. You may enter the ID of one of your accounts or any phone number. If you leave this field blank, then the abbreviated number is considered to be a direct number, or "dial as is." This is useful for making sure that special numbers (e.g. 112) are never converted by other translation rules. **NOTE:** Phone numbers must be entered in the E.164 format.
Description	Description of this abbreviated number, e.g. "Andrew's IP phone."

Dialing Rules

Using this tab, you can define a way of dialing phone numbers that is convenient to you or your users.



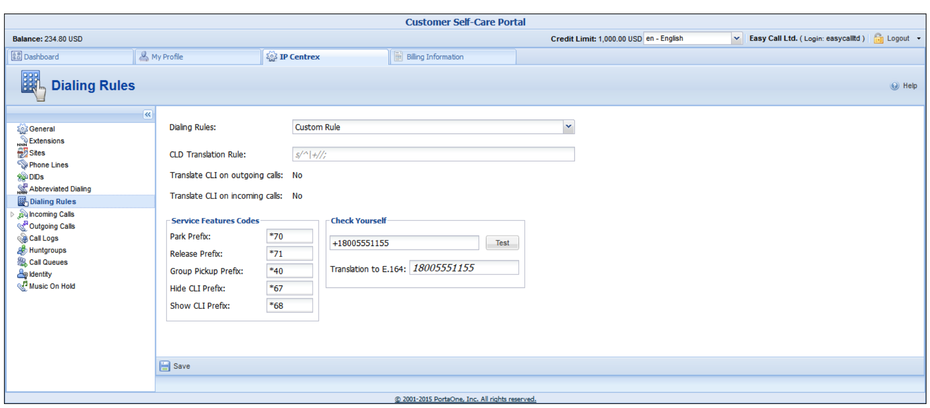
By default, the Dialing Rules feature is disabled. This means that the system identifies calls arriving from a user as being in the E.164 format. If the Dialing Rules feature is enabled by your service provider, this will allow you to define various dial plan parameters such as an international dialing prefix or area code, feature access codes.

You can selected one of the predefined dialing rules from the list.
To define your own translation rule select **Custom Rule** from the list.

Verify that for all examples provided (domestic and international calls) this is how you want the numbers dialed and click **Save**.

You can also review whether a caller's number will be translated according to the selected rule for incoming and outgoing calls. (Note that only administrators can turn the translation feature on and off.)

When the dialing rule is defined with a Perl regular expression, in the **Check Yourself** section, type the phone number in the format you are accustomed to and click **Test**.

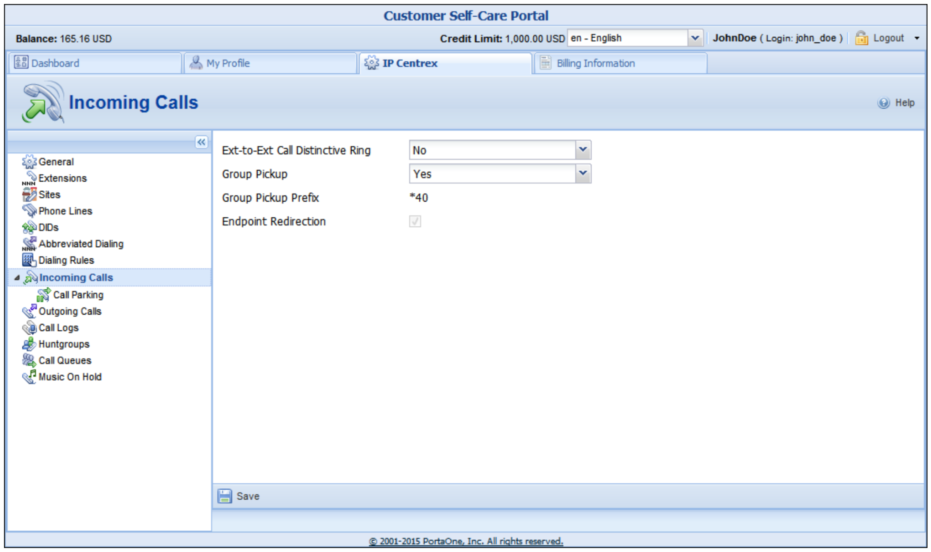


Service features codes

Field	Description
Park Prefix	An end user can dial this access code to park a call. The default value is *70. This access code is available only if call parking is enabled for the customer.
Release Prefix	An end user can dial this access code to retrieve a call from the parked status. The default value is *71. This access code is available only if call parking is enabled for the customer.
Group Pickup Prefix	An end user can dial this access code to answer a call arriving to the other accounts of this customer. The default value is *40. This access code is available only if group call pickup is enabled for the customer.
Hide CLI Prefix	An end user can dial this code before dialing the phone number to prohibit the calling number from being displayed to the called party. The default value is *67. This access code is available only if **Hide CLI** is enabled for the account.
Show CLI Prefix	An end user can dial this access code before dialing the phone number to allow the calling number to be displayed to the called party. The default value is *68. This access code is available only if **Hide CLI** is enabled for the account.

Incoming Calls

Here you can set the parameters for incoming calls.


Customer Self-Care Portal
Balance: 165.16 USD
Credit Limit: 1,000.00 USD
en - English
JohnDoe (Login: john_doe)
Logout
Dashboard
My Profile
IP Centrex
Billing Information
Incoming Calls
Help
General
Extensions
Sites
Phone Lines
DIDs
Abbreviated Dialing
Dialing Rules
Incoming Calls
Call Parking
Outgoing Calls
Call Logs
Huntgroups
Call Queues
Music On Hold
Ext-to-Ext Call Distinctive Ring
No
Group Pickup
Yes
Group Pickup Prefix
*40
Endpoint Redirection
Save
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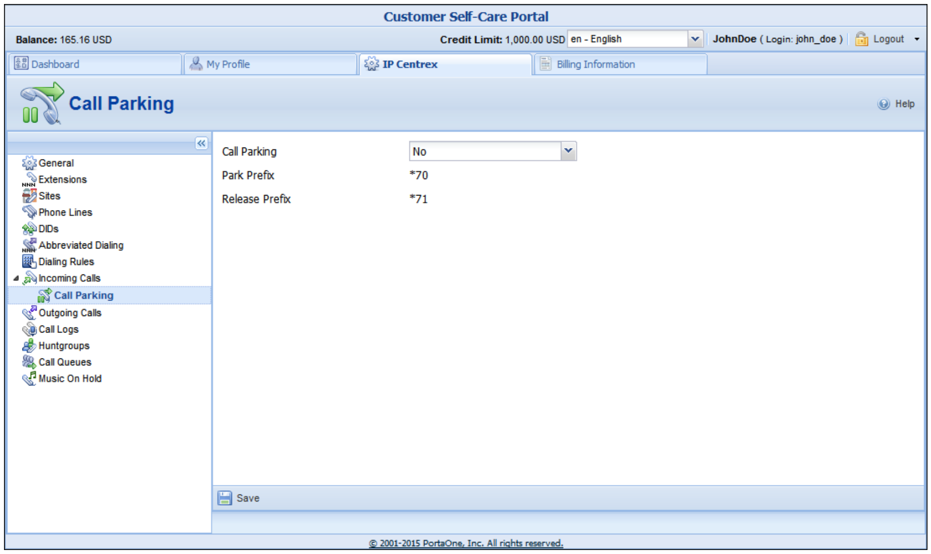
Field	Description
Ext-to-ext call distinctive ring	For incoming calls from phones within the IP Centrex environment, use a ring pattern different from the default one.
Group Call Pickup	The **Group Pickup** feature enables an end user to answer a call arriving to the other accounts of this customer by dialing a **Group Pickup Prefix**. • Select **Yes** to activate group pickup for the customer. • Select **No** to make group pickup unavailable to the customer. Note that group pickup must be enabled for the particular huntgroup as well.
Group Pickup Prefix	An end user can dial this access code to answer a call arriving to the huntgroup that this end user belongs to. The default value is *40. This access code is available only if group pickup is enabled for the customer. Read-only field. For information about how to configure **Group Pickup Prefix**, please see the *Service Feature Codes (also know as Feature Access Codes)* table in the **Dialing rules** section of this guide.

Call Parking

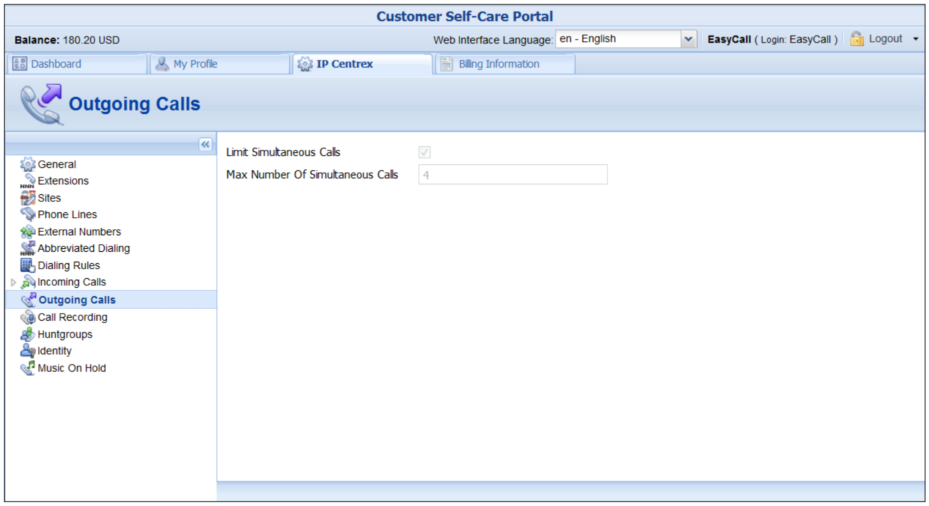
Call parking allows users to put a conversation on hold and then resume it from a different IP phone. If you enable this feature, you can set the required parameters for it here.



Field	Description
Call Parking	• Select **Enabled** to activate call parking for the customer. • Select **Disabled** to make call parking unavailable to the customer.
Park Prefix	An end user can dial this access code to park a call. The default value is *70. This access code is available only if call parking is enabled for the customer. Read-only field. For information about how to configure **Park Prefix**, please see the *Service Feature Codes (also known as Feature Access Codes)* table in the **Dialing rules** section of this guide.
Release Prefix	An end user can dial this access code to retrieve a call from the parked status. The default value is *71. This access code is available only if call parking is enabled for the customer. Read-only field. For information about how to configure **Release Prefix**, please see the *Service Feature Codes (also known as Feature Access Codes)* table in the **Dialing rules** section of this guide.

Outgoing Calls

Here you can view different parameters for outgoing calls (note that this page is read-only).

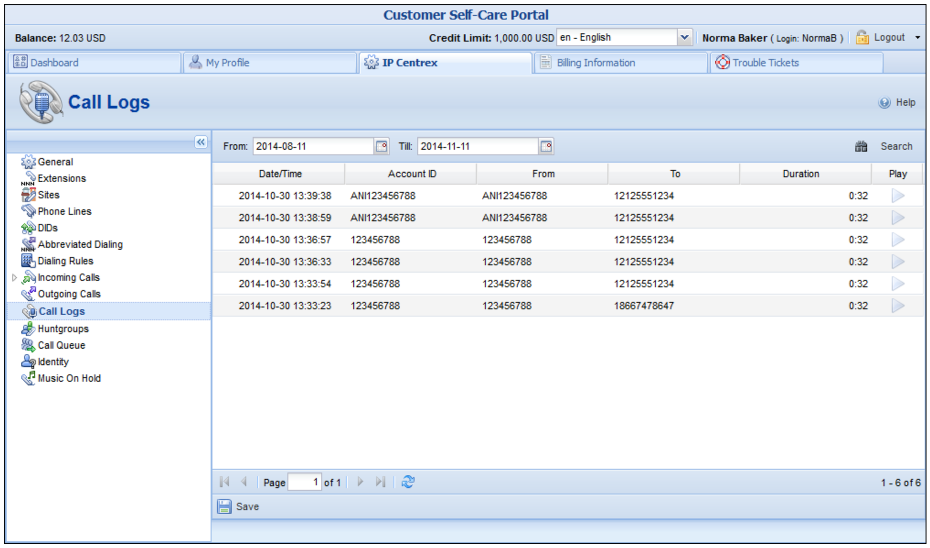


Field	Description
Limit Simultaneous Calls	This shows whether there is a limit on the number of concurrent calls that can be made by your phone lines.
Max Number of Simultaneous Calls	This shows the maximum number of concurrent calls permitted for your phone lines.

Call Logs

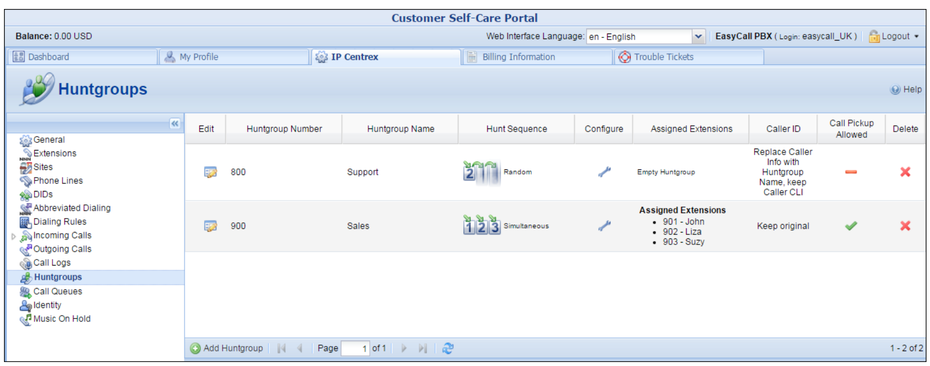
With the help of this feature, the users of IP Centrex services can record their phone conversations for later playback.

Here you can check whether the **Call Recording** feature is enabled or not. When it is enabled, you can view information about calls, listen to recordings and filter them for / from a certain period.



Huntgroups

Sometimes it is necessary for a call to be delivered to several extensions at once. With the **Huntgroup** function, you can easily configure a call distribution scheme such that incoming calls are simultaneously delivered to one or more assigned extensions.



Branch Office huntgroups can only be added, deleted or modified on the Main Office self-care interface.

How to add a new huntgroup

To add a new huntgroup click the **Add Huntgroup** button and enter the following information:

- **Huntgroup Number** – The number the end user must dial on his phone to reach one or more assigned extensions.
- **Huntgroup Name** – Short descriptive name for this group of extensions, e.g. "Sales department."
- **Hunt Sequence** – The order for delivering a call to one or more extensions.

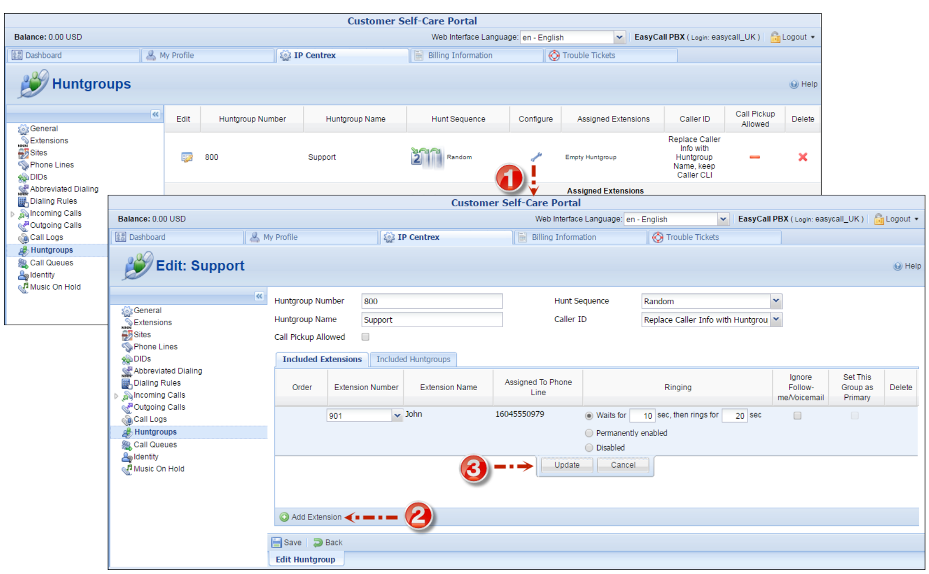
- If **Order** is selected, extensions will be called one by one from the first (topmost) to the last number until the call is answered.
- Select **Random** if you want to use a random order.
- **Simultaneous** enables simultaneous calls to every extension from the list.
- **Least Used** sorts the phone lines in descending order beginning with their last usage, and delivers a call to their extensions, accordingly.

  For example, phone line 777111 with extension 111 was last used on 2015-09-11, and phone line 777222 with extension 222 was last used on 2015-09-09, so the call goes to extension 111 and if it is not answered, it goes to extension 222.

- **Caller ID**:
  - **Keep original**.
  - **Set to name and CLI of the huntgroup**.
  - **Replace Caller Info with Huntgroup Name, keep Caller CLI**.

- **Call Pickup Allowed** – Enable this option to allow extensions to pick up calls made to the members of this hunt group.

- **Assigned Extensions** – To specify which extensions the calls will be delivered to, follow the steps below:

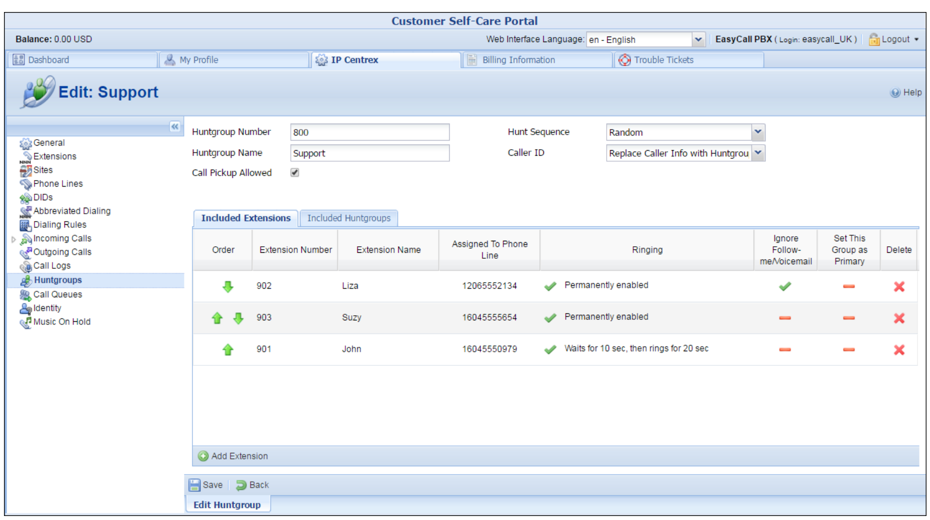


1. Click the **Configure** icon.

2. Click the Add Extension button on the **Included Extensions** tab.
3. From the **Extension Number** list, select the required extension.
4. Specify the following options:
   - **Ringing** – Specify whether this extension rings when a call arrives to the huntgroup:
     - **Waits for … sec, then rings for … sec** – Specify the delay in seconds before the extension begins to ring and the duration of the ring.
     - **Permanently enabled** – The extension is always active and rings once a calls arrives to the huntgroup.
     - **Disabled** – The extension does not ring when a call arrives to the huntgroup. The extension owner can still perform call pickup if that has been defined for the huntgroup.

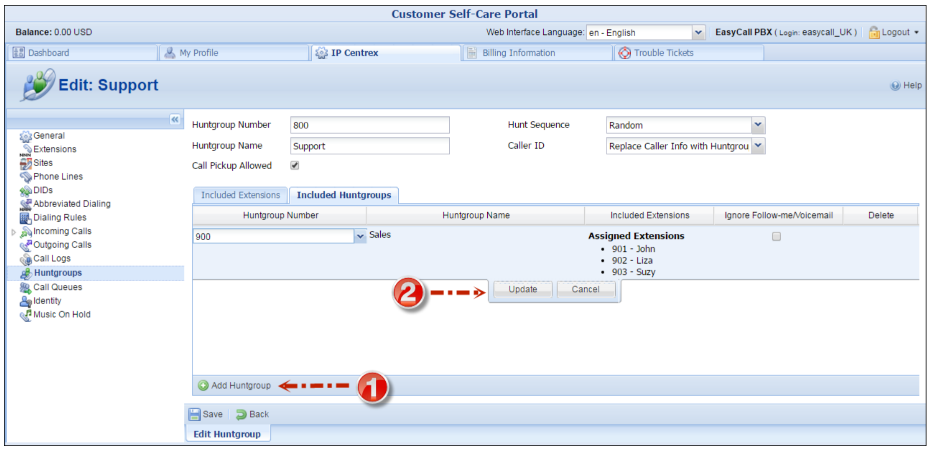
   - **Ignore Follow-me/Voicemail** – Select this check box to disable forwarding (voicemail, follow-me) on the specific extension for calls made to this huntgroup.
   - **Set This Group as Primary** – Select this check box to allow the extension owner to pick up calls within that group by merely dialing the group pickup prefix.

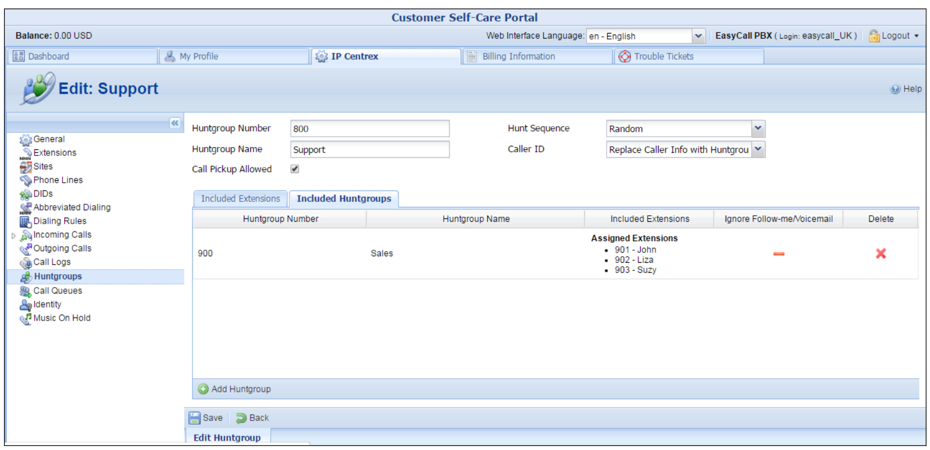
5. Click **Update**.



In order for changes to take effect you need to click the **Save** button at the bottom of the page. You can also use the **Back** button to return to the previous menu.

Several huntgroups can be combined into one huntgroup. Go to the **Included Huntgroups** tab and choose the required huntgroups to add from the list of **Huntgroup Number**. Select the **Ignore Follow-me/Voicemail** check box to disable forwarding for calls made to this huntgroup. Then click **Update** and **Save**.





NOTE: Extension and huntgroup numbers must be different.

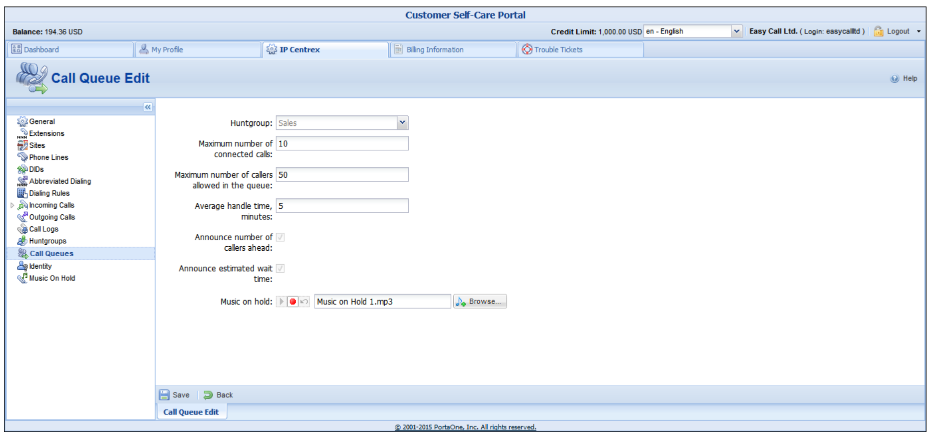
Call Queue

This feature allows you to provide a "call center" functionality to your IP Centrex customers. When a large number of incoming calls from customers arrive to the auto attendant, PortaSIP® can forward these calls to the actual agents within a huntgroup (customer service representatives) in a regulated fashion.

When a new incoming call arrives, it is assigned a position in the queue. The callers hear announcements about number of callers ahead of them in the queue and the estimated waiting time. After that, the specified "music on hold" is played, and every 5 minutes the callers are updated about their current positions in the queue and the estimated wait time.

Note that estimated wait time is calculated as follows:

- For the *new* Media Server:
  (Average handle time)*(Number of callers ahead).
- For the *previous-generation* Media Server:
  (Average handle time)*[(Number of simultaneous calls made to the call queue number) – (Maximum number of outgoing calls to agents)].



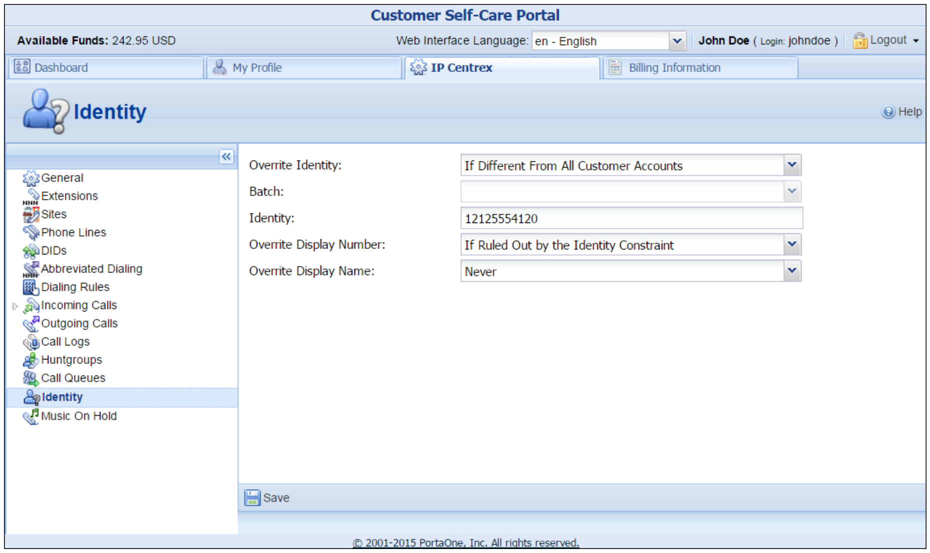
Every call queue contains several configuration parameters:

Field	Description
Huntgroup	When creating a new call queue, a customer must select a huntgroup so that when a call arrives to the call queue, it is transferred to the corresponding huntgroup. **Note**: Empty huntgroups are not listed. Add at least one extension to the huntgroup first.
Maximum number of connected calls	The maximum number of calls that agents can process simultaneously. You can think of it as the number of agents who answer calls made to a call center (e.g. if you have 5 agents who answer calls made to Sales, they can process a maximum of 5 calls, simultaneously). **NOTE:** This option is used only by the *previous-generation* Media Server which uses it to define whether the next call that arrives to the call queue must be placed on hold or connected

	to an agent. When the number of simultaneous calls made to the call center exceeds the value defined for this option (e.g. 10 calls arrived to the call center simultaneously, but there are only 5 agents who answer calls), the Media Server places calls 6–10 on hold within the queue. When the number of simultaneous calls made to the call center is fewer than the value defined for this option (e.g. 5 calls arrived to the call center simultaneously and there are 10 agents to answer calls), the Media Server immediately attempts to connect all calls to agents. Therefore it's important to specify a true-to-life number: if you specify a number that is too low, some calls will be queued even if there are free agents; if you specify too high a number, some calls won't be queued even if there are no actual agents to answer them. Subsequently it will be a regular call for these callers, with no queue announcements.
Maximum number of callers allowed in the queue	The maximum number of calls that can be placed on hold within this queue. When this number is reached, the next call is disconnected.
Average handle time, minutes	The expected average processing time for each call in minutes (used to calculate the estimated wait time).
Announce number of callers ahead	When this check box is selected, callers will hear an announcement about number of callers ahead of them in the queue. Note that this check box is currently always selected and dimmed.
Announce estimated wait time	When this check box is selected, callers will hear an announcement about the estimated wait time. Note that this check box is currently always selected and dimmed.
Music on Hold	A melody (or announcement) which is played to users waiting to be connected. The maximum file size allowed is 3 MB.

Identity

On this page information about your identity (your phone number) is displayed. Here you can manage the identity that will be used for outgoing calls made from all of your phone lines.



NOTE: You can only manage the identity if you have been granted special permission by your service provider.

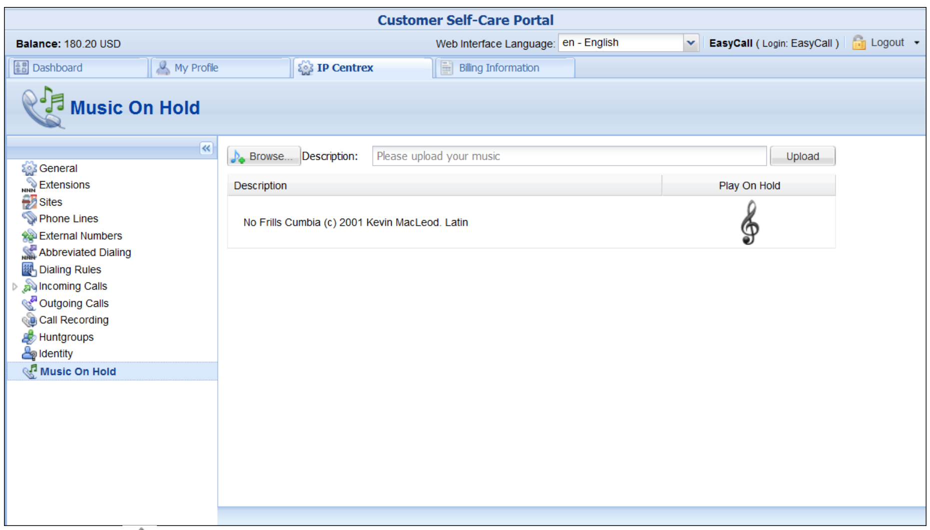
Column	Description
Override Identity	This option defines the rules for which identity will be used for outgoing calls made from all of your phone lines based on the one supplied by the user's phone device. The following options are available: • **Never** – This option means that the caller identity (display number and display name) will be displayed for the callee exactly as it was configured by the user on his device. • **If Different From Account ID And Aliases** – The caller identity supplied by the user's phone device will be overridden if it differs from the phone line authorized for the call or any of the aliases assigned to this phone line. • **If Different From All Customer Accounts** – The caller identity supplied by the user's phone device will be overridden if it doesn't match any of your phone lines or their aliases. • **If Different From All Accounts in the Specified Batch** – The caller identity supplied by the user's phone device will be overridden if it does not match any of the phone lines from a specific batch. • **If Different From All Accounts in the Specified Huntgroup** – The caller identity supplied by the user's phone device will be overridden if it does not match any of the extensions from a specific huntgroup.

	• **If Different From All Accounts in the Specified Site** – The caller identity supplied by the user's phone device will be overridden if it does not match any of the phone lines from a specific site. • **Always** – The identity defined by the caller on his device will always be overridden by the identity that you define. This allows you to manually specify the display number and / or display name to be used for all of your phone lines.
Batch	Specify which batch the phone line that is verified for identity must belong to (this field is only available when **If Different From All Accounts in the Specified Batch** has been selected).
Huntgroup	Specify a huntgroup the phone line that is verified for identity must belong to (this field is only available when **If Different From All Accounts in the Specified Huntgroup** is selected).
Site	Specify the site the phone line that is verified for identity must belong to (this field is only available when **If Different From All Accounts in the Specified Site** is selected).
Identity	Specify the identity that will be used to override the identity sent by the caller's device if that one doesn't comply with the rules specified in the **Override Identity** list.
Override Display Number	This allows you to control the "Caller number" – the number that is visible on the phone display of the called party. The possible values are: • **Never** – The caller's display number will not be modified and will be displayed for the called party as is. • **If Ruled Out by the Identity Constraint** – The caller's display number is verified according to a rule set for the identity. For example, when the *If Different From Account ID and Aliases* option is selected in the **Override Identity** list, and the caller's display number doesn't match the phone line that is authorized for the call or any of the aliases assigned to this phone line, the display number will be overridden. • **If Different From the Used Identity** – The caller's display number will be overridden if it is different from the caller identity used for the call. • **Always** – The display number will always be overridden, regardless of the limitations applied to the identity.

Override Display Name	This allows you to override the caller name used by the calling account. The possible values are: • **Never** – The display name defined by the user will not be modified and will be displayed for the called party as is. • **Always** – The display name defined by the user will always be overridden.

Music on Hold

Here you can define which music will be used for calls on hold within your IP Centrex environment.



Click the 𝄞 **Play On Hold** button to enable / disable this feature. To upload your own music, select a file from your local file system using the **Browse** button.

To rename the music file, enter the desired name in the **Music Name** field; otherwise the local file name will be used. The uploaded music will replace the previous entry in the list, and will usually be enabled within 10 minutes of performing this action.

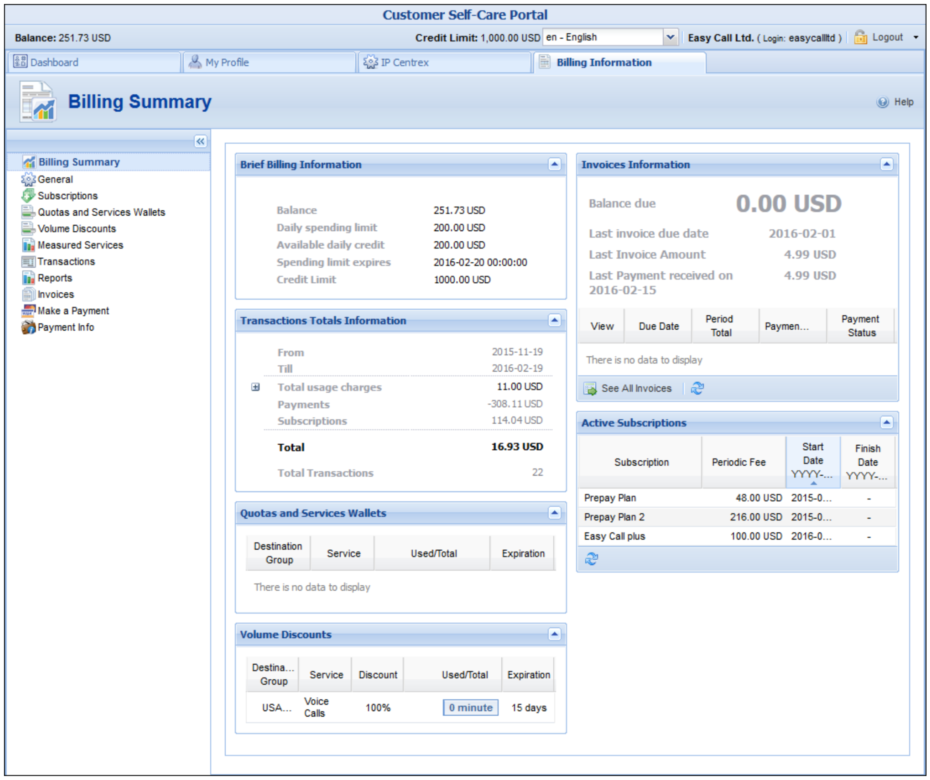
Billing Information tab

Billing Summary

On this page you can view your billing information arranged in six information panels:

- Brief Billing Information
- Transactions Totals Information

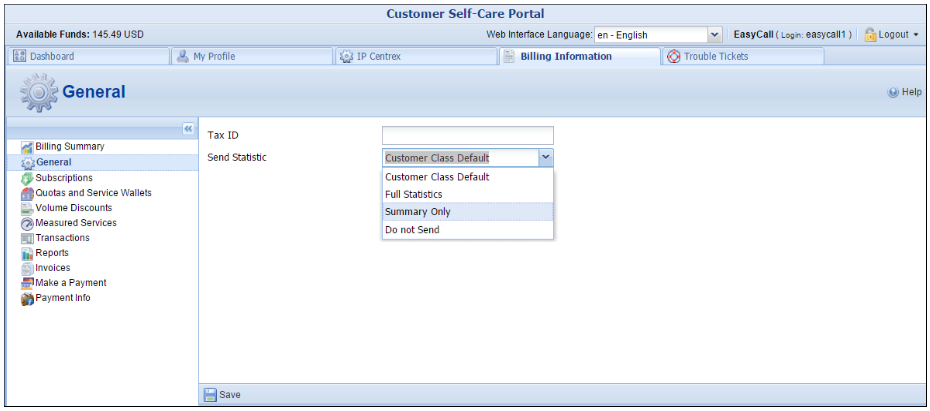
- Invoices Information
- Active Subscriptions
- Volume Discounts
- Quotas and Service Wallets



Field	Description
Brief Billing Information	This reflects your billing info, such as current balance, credit limit, daily spending limit, etc. The available information fields are: • **Balance** – This shows the customer's current balance. • **Daily spending limit** – This shows the amount of money per day that the customer can spend on services. • **Available daily credit** – This shows the amount that the customer has already spent of their daily spending limit. • **Autoreset the limit on** – This shows the date and time when the daily spending limit expires. • **Credit Limit** – This shows the customer's current credit limit.
Transactions Totals	This reflects your total transactions (calls, payments, refunds, subscription charges, etc.)

Information	
Invoices Information	This section is intended to help you better understand your invoice status and other billing-related details – a thumbnail sketch, so to speak, of how much money is owed, the due date, is there any amount overdue, etc. The available information fields are: • **Balance Due** – This represents the remaining amount you must pay for your invoice. • **Last Invoice Due Date** – This shows the date by which the last invoice should be paid. If no payment is received for this invoice or the invoice is only partially paid and the due date has passed, the invoice is considered overdue. • **Last Invoice Amount** – This represents the last invoice total plus whatever unpaid amount from any and all previous invoices owed by the customer at the time of invoice generation. • **Overdue Balance** – This represents the total remaining balance for all overdue invoices. The overdue balance decreases as payments are received. • **Last Payment Received on** – This shows the amount of the last payment and the date when this transaction took place. To view all of the invoices use the **See All Invoices** button.
Active Subscriptions	Subscription plans that currently apply to you.
Volume Discounts	Volume discount plans that currently apply to you.
Quotas and Service Wallets	Quotas and service wallets that currently apply to you.

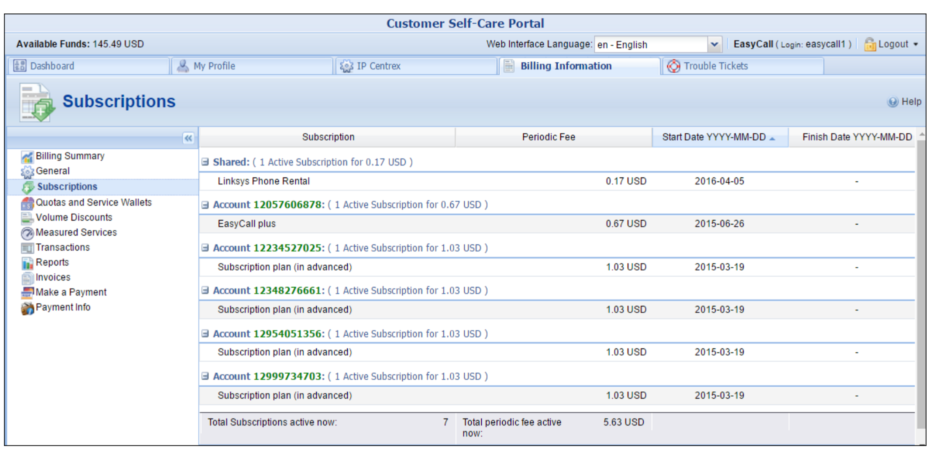
General



Field	Description
Tax ID	Your tax ID.
Send Statistic	Defines what kind of xDR statistics should be delivered to you by email: • **Customer class default** – Use the settings for the customer class. • **Full Statistics** – Send a .cvs file with a complete list of xDRs. • **Summary Only** – Do not send a full list of xDRs, only a brief summary • **Do Not Send** – This option prevents the delivery of event statistics to the customer via email.

Subscriptions

This tab displays the subscription plans currently being applied to you and your phone lines. Pending (not yet active) subscriptions are always on the bottom of the list and highlighted in grey.



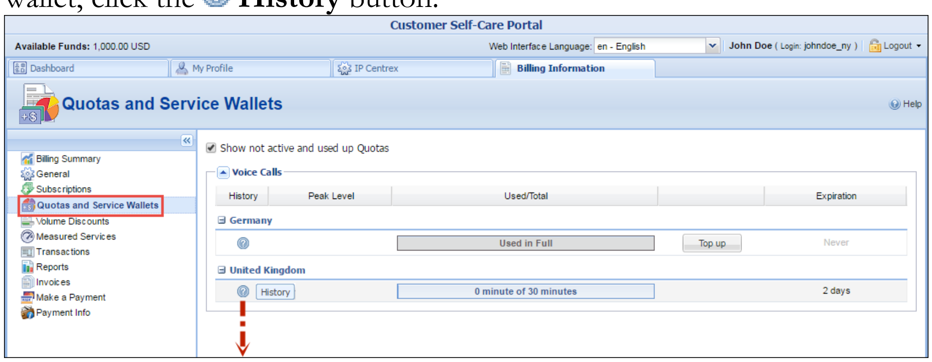
Field	Description
Subscription	Subscription plans being applied to you.
Periodic Fee	This is a recurring fee for a particular subscription.
*	Default fee and the amount of discount applied for this subscription.
Start Date	Subscription activation date.
Finish Date	This shows the date on which this subscription will be automatically canceled.

Quotas and Service Wallets

This page displays all *active* quotas and service wallets available for you. To display the *inactive* ones, select the **Show not active and used up Quotas** check box.

Using this page, you can top up your service wallet by credit card or transfer money from your main balance. To do this, click the **Top up** button. It redirects you to the **Make a Payment** page where you can select the necessary amount of service and proceed with the payment procedure.

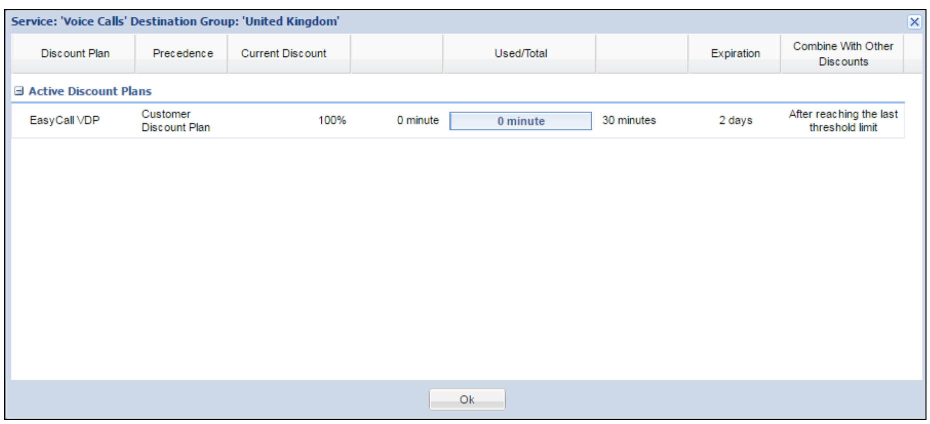
To find more extensive information about a particular quota or service wallet, click the **History** button.



Field	Description
Show not active and used up Quotas	Displays the quotas and service wallets with the *Consumed / Used up* and *Not Yet Active* status applicable to you.
Service	A specific service (voice calls, messaging, data transfer, etc.) that this quota or service wallet will apply to.
Destination Group	Information about quotas or service wallets used and remaining is shown, grouped by destination group names. Each name represents one group included in the discount plan assigned to you.

History	Shows extended information about the discount plans.
Peak Level	Shows when the quota is used (peak or off-peak period).
Used / Total	Shows the current value of both consumed and remaining quotas. The progress bar graphically reflects how much of the quota has been consumed.
Top up	Click this button to initiate a top-up procedure. The system redirects you to the **Make a Payment** page and shows the top-up options and their fees. When the necessary option is selected, you can choose to either transfer money from your balance or pay by credit card right on the same page. Please find detailed instructions in the **How To Top up a Service Wallet** section. **NOTE:** If the **Top up** button is not available for you, please contact your service provider.
Expiration	Shows the time left for the quota to be reapplied. Service wallets do not have an expiration date, so ***Never*** is displayed in their cells.

History dialog box



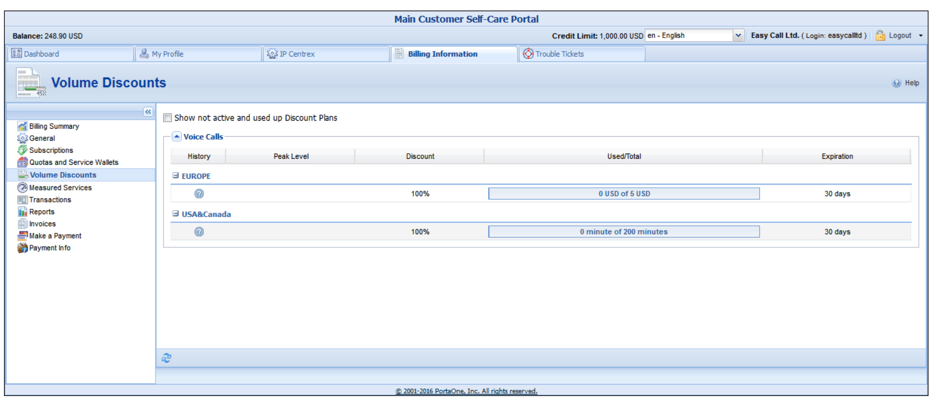
Field	Description
Status	The current status of the discount plans. • **Active** – The discount plans that are currently in use. • **Consumed / Used Up** – The discount plans that have already been used up. • **Not Yet Active** – Currently inactive discount plans.
Discount Plan	The name of the discount plan applicable to you.

Precedence	This is the priority level for the currently used discount plan that specifies the order in which certain discounts are to be applied. Discounts with higher priority take precedence over discounts with lower priority. For more details about the discount's priorities look in the *Applying Volume Discount Plans* chapter of the **PortaBilling Administrator Guide**.
Current Discount	The value of the discount currently applied to you.
Used / Total	Shows the current value of both consumed and remaining quotas. The progress bar graphically reflects how much of the quota has been consumed.
Expiration	The time left for the quota counters to be reset. Service wallets do not have an expiration date, so ***Never*** is displayed in their cells.
Combine with Other Discounts	Shows the way this quota is applicable to a session in combination with other quotas.

Volume Discounts

The **Volume Discounts** group displays all *active* discounts that apply to you. To display *inactive* discount plans, the **Show not active and used up Discount Plans** check box must be selected.

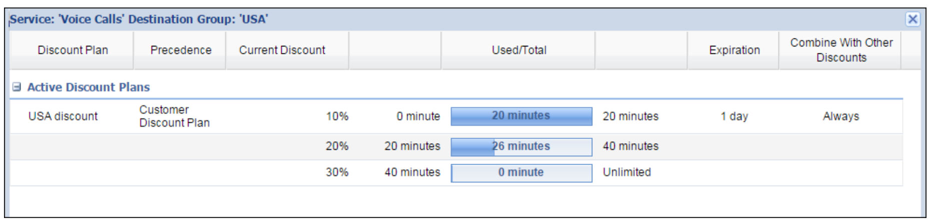
Information about volume discounts' usage history can be obtained in the **History** dialog box, which is visible by clicking the **History** button.



Field	Description
Show not active and used up Discount Plans	Displays the volume discounts with *Consumed / Used up* or *Not Yet Active* status applicable to you.
Service	A specific service (voice calls, messaging, data transfer, etc.) that this volume discount will apply to.

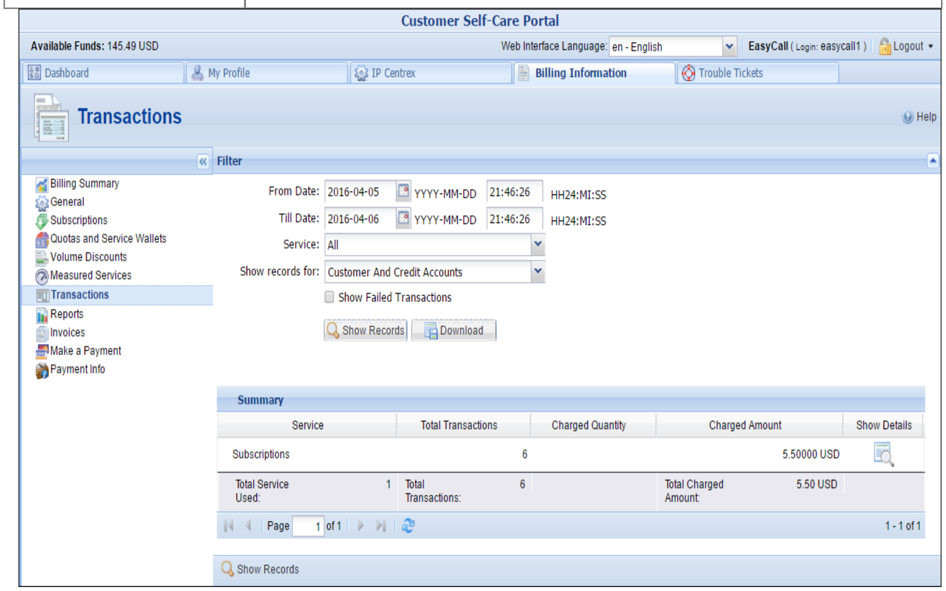
Destination Group	Information about discounts used and remaining is shown, grouped by destination group names. Each name represents one group included in the discount plan assigned to you.
History	Shows extended information about the discount plan.
Peak Level	Shows when the discount is used (peak or off-peak period).
Discount	The value of the discount currently applied to you.
Used / Total	Shows the current value of both consumed and remaining discount volume. The progress bar graphically reflects how much of the discounted service has been consumed.
Expiration	Shows the time left for the discount to be reapplied to you. If **Never** is selected, it means that this discount is for one-time use and will not be reapplied to you.

History dialog box



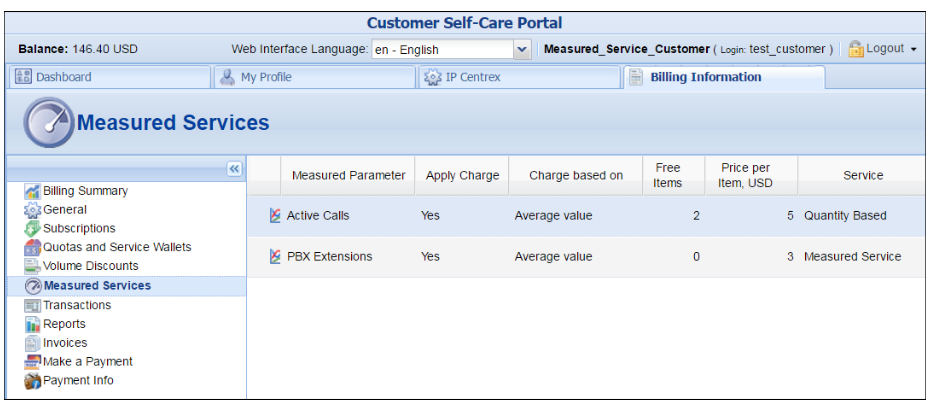
Field	Description
Status	The current status of the discount plan. • **Active** – The discount plans that are currently in use. • **Consumed / Used Up** – The discount plans that have already been used up. • **Not Yet Active** – Currently inactive discount plans.
Discount Plan	The name of the discount plan applicable for you.
Precedence	This is the priority level for the currently used discount plan that specifies the order in which certain discounts are to be applied. Discounts with higher priority take precedence over discounts with lower priority. Find more details about the discount's priorities in the *Applying Volume Discount Plans* chapter of the **PortaBilling Administrator Guide**.
Current Discount	The value of the discount currently applied to you.
Used / Total	Shows the current value of both consumed and remaining discount volume. The progress bar

	graphically reflects how much of the discounted service has been consumed.
Expiration	The time left for the discount counters to be reset.
Combine with Other Discounts	Shows the way this discount plan is combined with other discount plans applicable to a session. Find more details about this in the *Modes for Combining Discounts* chapter of the **PortaBilling Administrator Guide**.



Measured Services

On this tab you can view the parameters of allocated resources usage and their usage statistics.

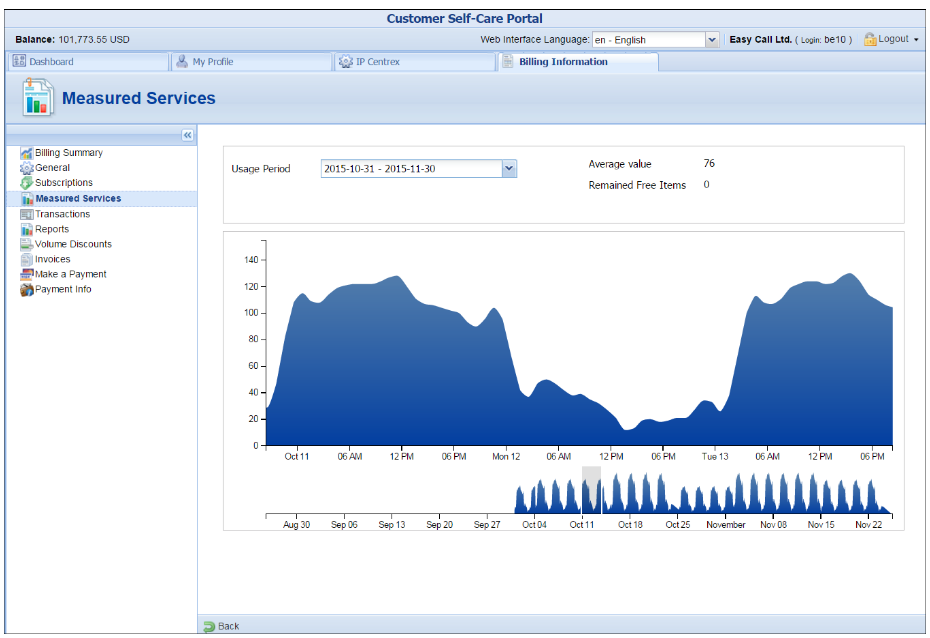


Field	Description
Measured Parameter	The name of the allocated resource that you use and are charged for.
Usage Period	Represents your billing period. Any billing period can be selected.

Apply Charge	Defines whether or not this resource is free of charge.
Charge based on	Specifies how charges apply to you for allocated resource usage. The criteria are: • **Average** – The average amount of the consumed resource. • **Maximum** – The maximum amount of the consumed resource. • **Minimum** – The minimum amount of the consumed resource.
Free Items	The number of resources included in your service bundle.
Price per item	The price for each unit of consumed resources.
Service	The service associated with this resource.

Statistics window

Statistics are provided per resource. To open the statistics window, click the icon next to the resource name. On the statistics window you will see two graphs.



The bottom graph displays resource usage data for the last three months; the upper graph displays a detailed view of the resource usage for a particular time interval selected from the three-month period below.

To select a time period, click on the start date in the bottom graph and drag the mouse cursor to the finish date.

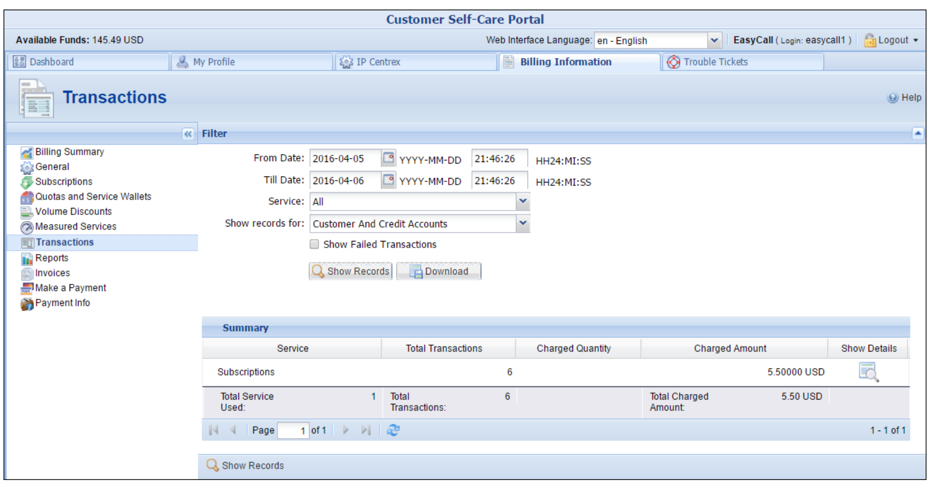
The topmost part of the window provides additional information about the selected metric. The following options are available:

Field	Description
Usage Period	Specify which billing period to see the information for.
Value	The value of measured resources for the current billing period. It can be minimum, maximum or average.
Remaining Free Items	Shows the number of free of charge resources available from your service bundle.
Applied Charges	Displays your charges for the selected billing period. Charges for the current billing period are not displayed because this period is not yet closed.

Transactions

Transactions (calls, payments, refunds, subscription charges, etc.) serve as the primary record of services provided to you.

This screen allows you to view and download transaction records – for any desired time period and service.



On the **Transactions Filter** page you can make an extensible search via:

- A date and time range by clicking the **Calendar** icon.
- A certain service type.
- The type of required phone lines (accounts).
- If you want failed transactions to be included in the list, select the **Show Failed Transactions** check box.

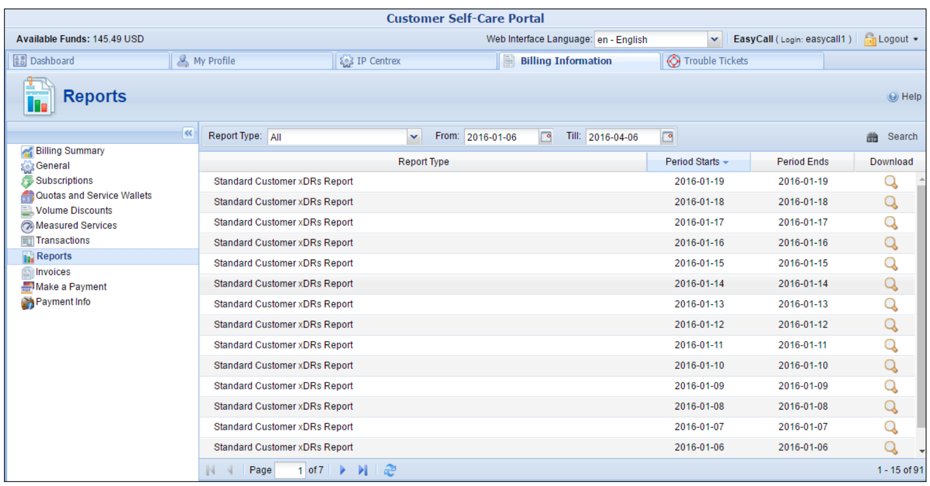
Set the from / to dates by clicking the **Calendar** icon and click the **Show Records** button. The result page contains a summary and tables list all calls and accompanying charges during a specified time period. If you want to view additional information (charged quantity and amounts due) for the chosen service(s), click the **Show Details** icon.

Click the Download **Download** button to download transaction detail records in the .csv format.

Reports

The **Reports** screen allows you to download xDR reports for any desired time period either in .csv or .pdf formats.

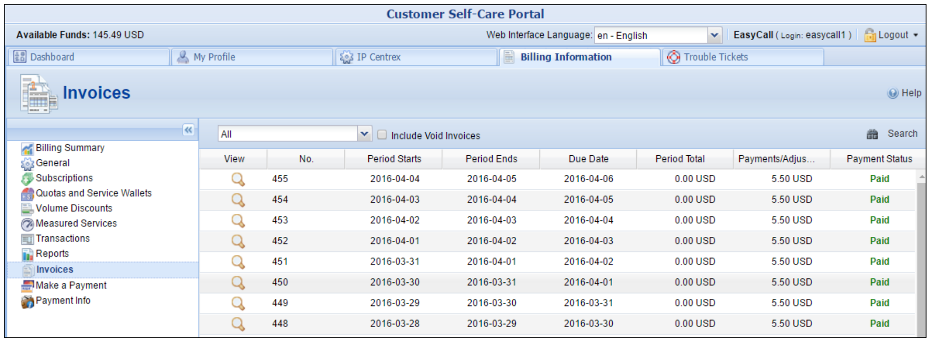
Set the from / to dates by clicking the icon and press the **Search** button. The resulting page contains a list of xDR reports generated within a specified time period. Each report is available in .csv and / or .pdf formats.



Click the **Download** button to download an xDRs report in the desired format.

Invoices

The **Invoices** page allows you to view your last 6, 12, 24 or all invoices. If you want to include void invoices, just select the corresponding check box and then click **Search**.



Invoices cover these parameters:

- **No. (invoice number)** – The unique identifier for an invoice.
- **Period Starts / Ends** – The billing period for which an invoice is issued.
- **Due Date** – The date by which the payment should be received.
- **Period Total** – The amount of money that you are supposed to pay.
- **Payments / Adjustments** – The sum of payments and adjustments that has been applied to your balance during the given billing period.
- **Payment status** – This specifies one of the following:
  - **Do Not Pay** – The invoice amount is 0, therefore no payment is required.
  - **Unpaid** – Payment has not yet been received.
  - **Partially Paid** – Payment has been received but in an amount less than the amount due.
  - **Paid** – Invoice has been paid in full.
  - **Overdue** – Invoice is unpaid and past due.
  - **N/A** – Payment status is not applicable for this invoice.

Click the **View** icon in the result list to view or print a particular invoice.

Make a Payment

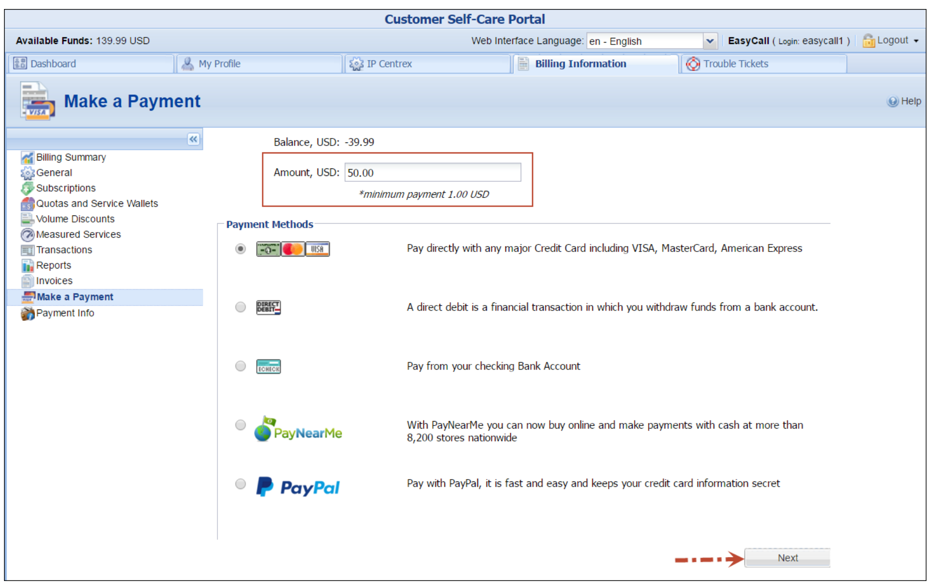
This page allows you to see your current balance and top it up by choosing one of the available payment methods.

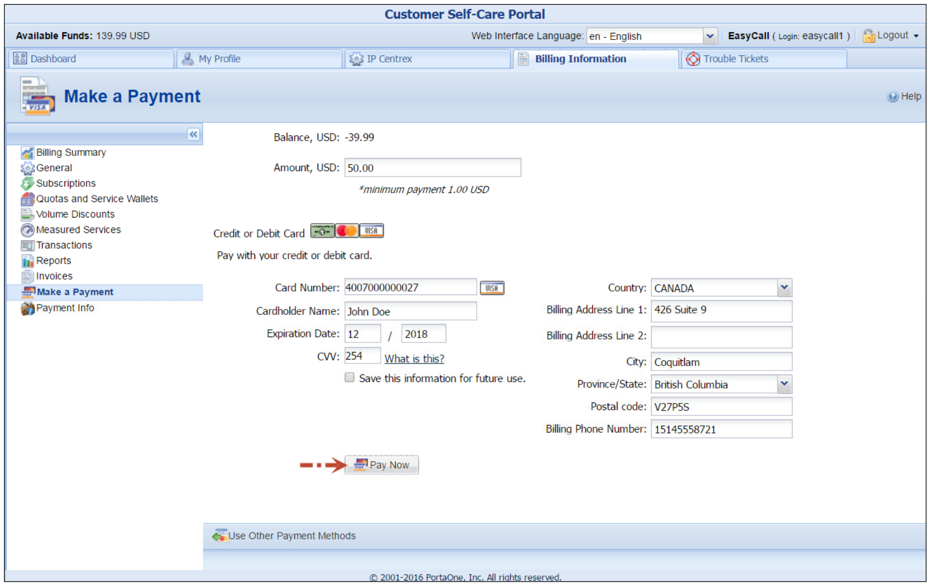
The list of currently supported payment methods is the following:

- **Credit or Debit Cards** – Allows you to pay using your credit or debit card. If you have a credit card whose payment characteristics are recorded in the system, it will be used by default.
- **Bank account (eCheck)** – Allows paying from your checking bank account.

- **Direct Debit NL** – Allows you to perform financial transaction in which you withdraw funds from a bank account.
- **PayNearMe** – Allows you to pay for services in cash at any 7-Eleven or ACE Cash Express store across the United States. You need to specify your email to get a PayNearMe payment slip via email and then print it. The payment slip contains the bar code to be scanned at a 7-Eleven or ACE Cash Express location. You pay cash to the store clerk, who then records the transaction – the payment information is immediately delivered to the service provider via the PayNearMe network. PortaBilling® records the transaction and updates your balance so you can immediately start using the service.
- **PayPal** – Allows you to pay using your PayPal account.

To make a payment, select the desired payment method (one of the listed above), specify the amount you wish to pay and click **Next**. Specify the payment information and click the **Pay Now** button to proceed with the payment.





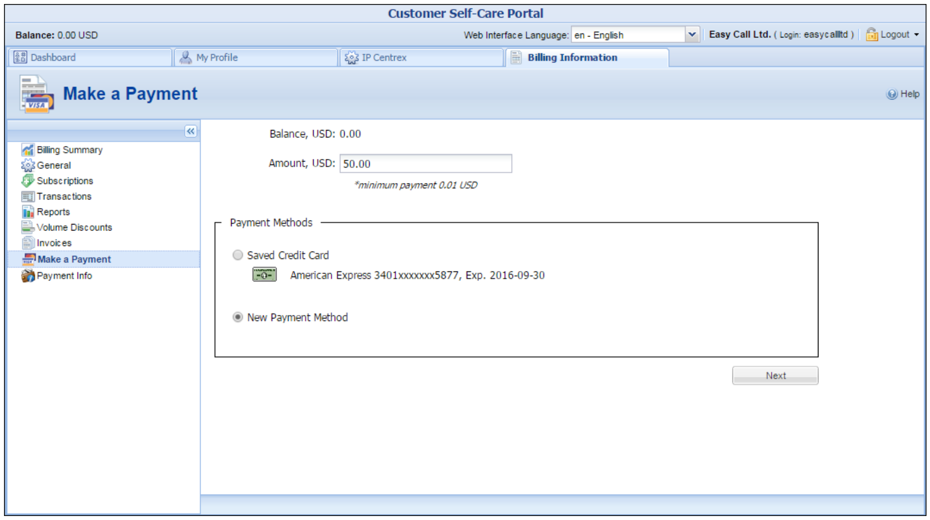
To pay with other payment method, click the 

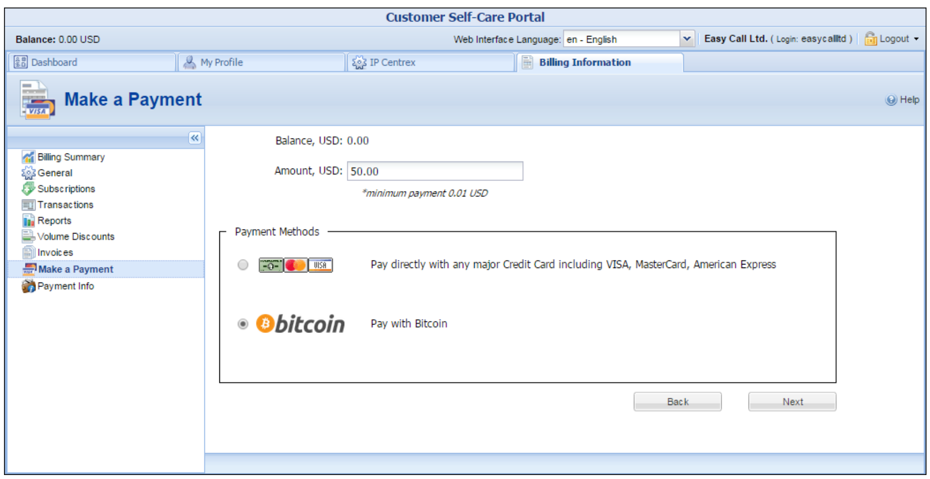
Use Other Payment Methods button.

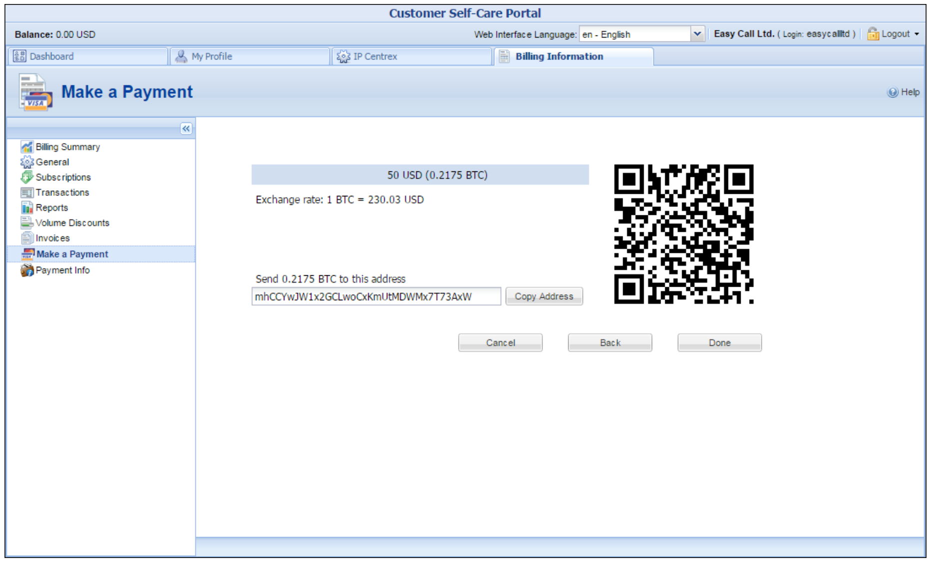
Pay with Bitcoins

You can also top up your balance with Bitcoins (BTC):

1. In the **Amount** field, type a top-up amount.
2. Choose **New Payment Method** and click **Next**.
3. Choose **Pay with Bitcoins** and click **Next**. You will see the top-up amount in Bitcoins according to the current exchange rate and the Bitcoin payment address to where payment must be sent.
4. With a Bitcoin client or Bitcoin wallet online service, send the top-up amount from your Bitcoin wallet to this address. For your convenience, the Bitcoin address can be scanned with a QR code.
5. When the transaction has been submitted, click **Done**.
6. Once the Bitcoin amount is received, your balance is topped up.


Customer Self-Care Portal
Balance: 0.00 USD
Web Interface Language: en - English
Easy Call Ltd. (Login: easycallltd)
Logout
Dashboard
My Profile
IP Centrex
Billing Information
Make a Payment
Help
Billing Summary
General
Subscriptions
Transactions
Reports
Volume Discounts
Invoices
Make a Payment
Payment Info
Balance, USD: 0.00
Amount, USD: 50.00
*minimum payment 0.01 USD
Payment Methods
Saved Credit Card
American Express 3401xxxxxxx5877, Exp. 2016-09-30
New Payment Method
Next


Customer Self-Care Portal
Balance: 0.00 USD
Web Interface Language: en - English
Easy Call Ltd. (Login: easycallltd)
Logout
Dashboard
My Profile
IP Centrex
Billing Information
Make a Payment
Help
Billing Summary
General
Subscriptions
Transactions
Reports
Volume Discounts
Invoices
Make a Payment
Payment Info
Balance, USD: 0.00
Amount, USD: 50.00
*minimum payment 0.01 USD
Payment Methods
Pay directly with any major Credit Card including VISA, MasterCard, American Express
bitcoin
Pay with Bitcoin
Back
Next

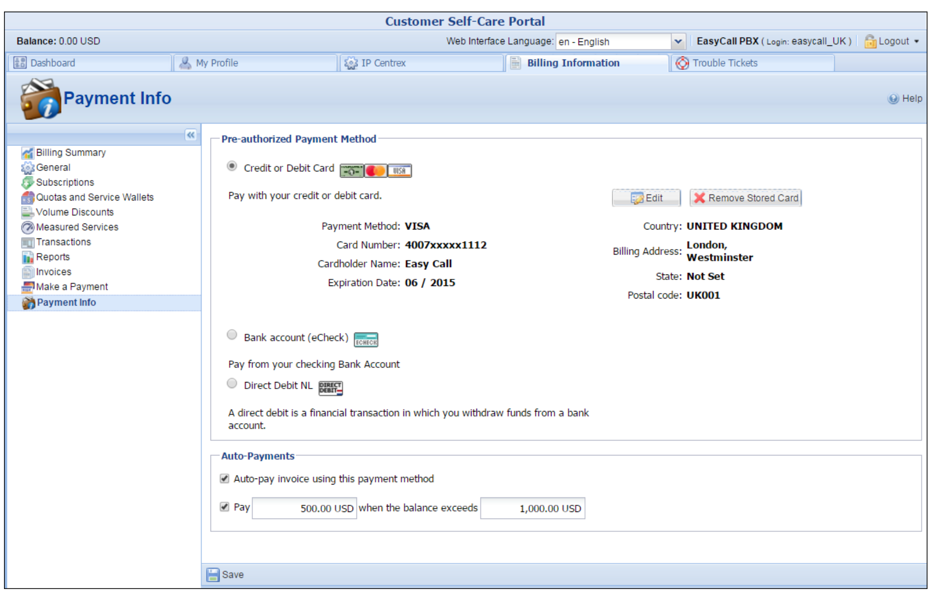


Taxes upon payment

If you use prepaid services, the taxes for such services are calculated and added to the amount you are topping up your account by. After you confirm your payment, your balance is topped up to reflect that actual amount.

Payment Info

On this page you can set up the pre-authorized payment method and configure auto payments.



Pre-authorized Payment Method

In this section you can choose which type of payment method to use: Credit or Debit Card, Bank account (eCheck) or Direct Debit NL).

Update your credit card information

If you want to pay with a different credit card, click **Edit** and enter the new card information. Click **Save** to save this new credit card information.

As soon as you add a new credit card to PortaBilling®, the credit card is verified. During the credit card verification process, the system performs an Authorization only transaction instead of an actual charge. The Authorization only transaction reserves an amount of money on your credit card for a certain time period. This does not affect your balance in PortaBilling® or change your credit card balance.

If the verification was successful, this new credit card information is stored. Further payments and automatic payments (if configured) will be made using this card.

Auto-Payments

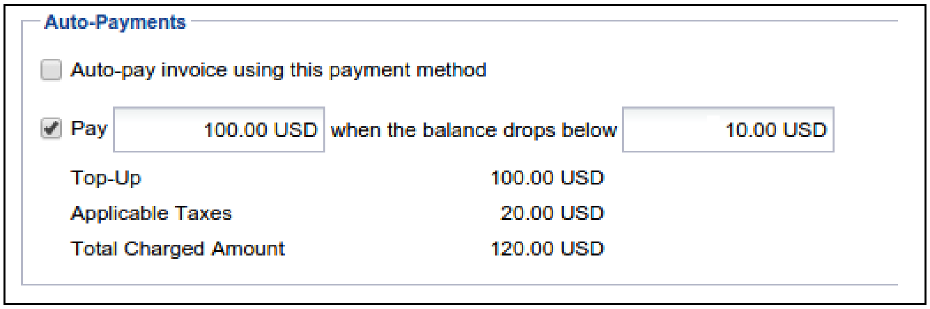
Note that the **Auto-Payments** section is only active if the **Pre-authorized Payment Method** is chosen and all the required information is filled in for it (for example, credit card information).

The **Auto-pay invoices using this payment method** allows you to define whether the pre-authorized payment method should be charged at the end of the billing period.

To set up automatic payment with pre-authorized payment method when the balance crosses a specified threshold, select the **Pay** check box and specify the threshold in the second field. When the balance crosses this threshold the pre-authorized payment method will be charged for the amount specified in the **Pay** field.

Taxes upon payment

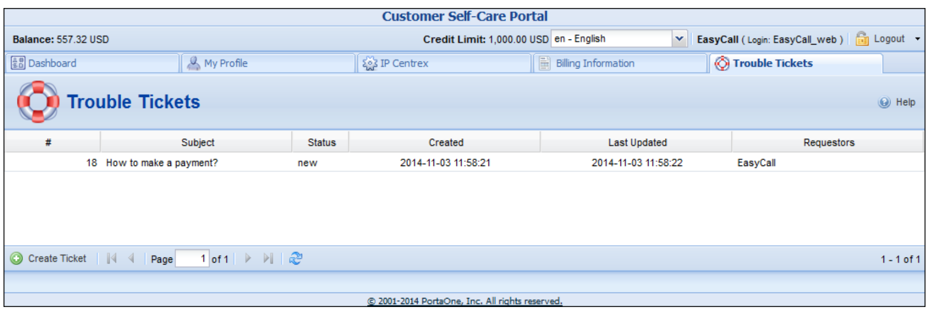
If you use prepaid services and the service provider has enabled the Taxes upon Payment functionality for you, the taxes for such services are calculated and applied when your balance automatically tops up.



The tax amount is calculated based on the amount of the top-up and then added to the payment sum. Upon successful payment processing, your balance is topped up by the total charged amount excluding tax.

Trouble Tickets tab

Using the **Trouble Tickets** tab, you can view a list of recent tickets and create new tickets within the RT (Request Tracking) system.

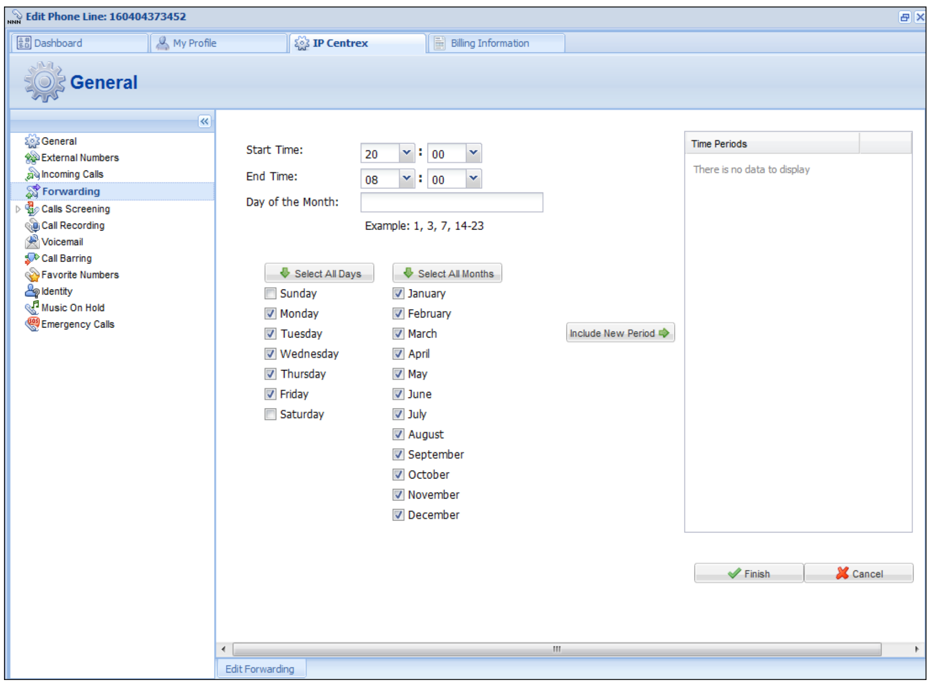


To create a new ticket, simply click the **Create Ticket** button at the bottom of the page.

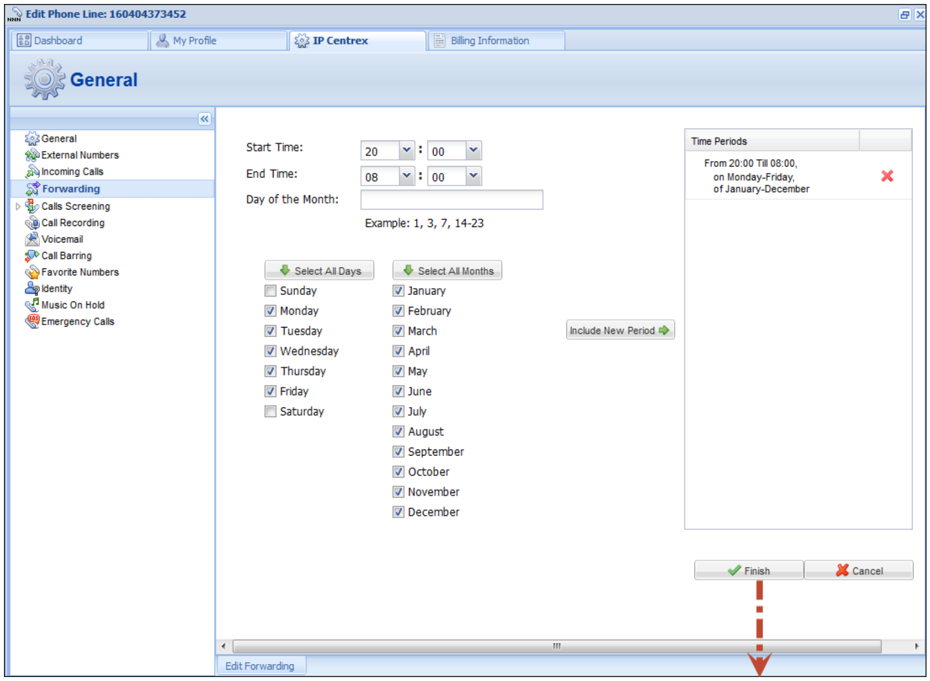
3. How To...

… Define a Time Period Using the Wizard?

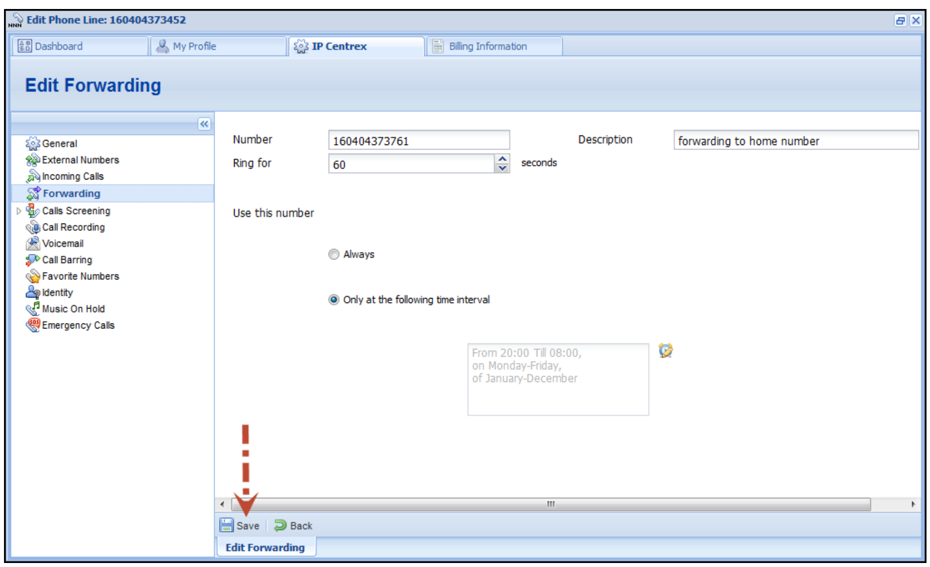
With the period definition wizard, you can easily define the time period for which a number (e.g. a follow-me number) will be used. If you want the number to be permanently active, click the **Always** button at the bottom of the **Period Wizard** page. Otherwise, define the desired period. (Times given are based on a 24-hour clock, i.e. 8 p.m. is the same as 20:00.) The Period Wizard is intuitive and lets you configure multiple time intervals from a single page in just a few mouse clicks. The following example illustrates the process of creating a period within the Monday–Friday workweek that starts at 8 p.m. and lasts until 8 a.m. the next morning:



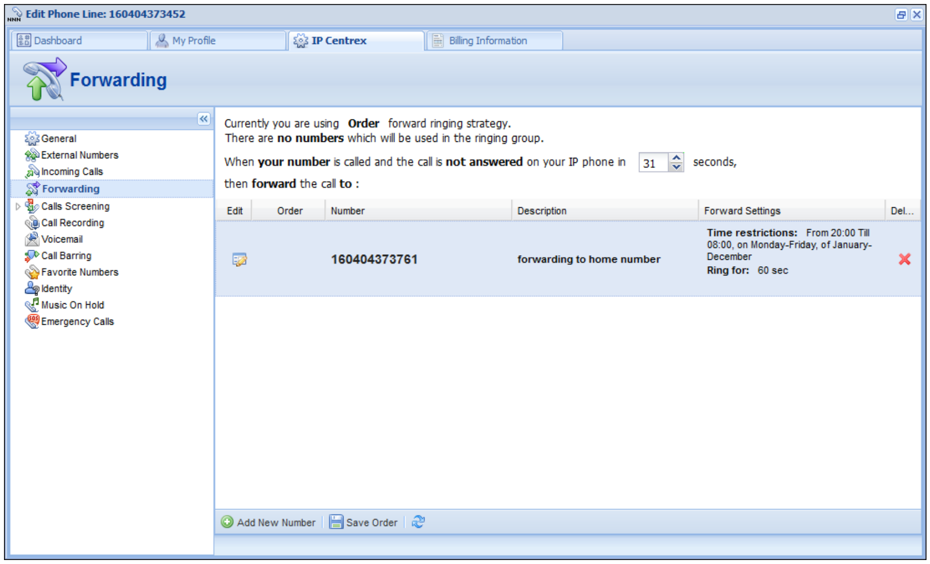
1. On the **Period Wizard** page, select **20:00** in the **Start Time** box and **08:00** in the **End Time** box. In the block containing days of the week select **Monday**, **Tuesday**, **Wednesday**, **Thursday**, **Friday**. In the block containing months click the **Select All Months** button.
2. Click the **Include New Period** button, and this time period will appear in the **Time Periods** panel on the right side of the page.



3. Click **Finish** to complete the period definition. If you wish to set another definition for this period, repeat step 1.

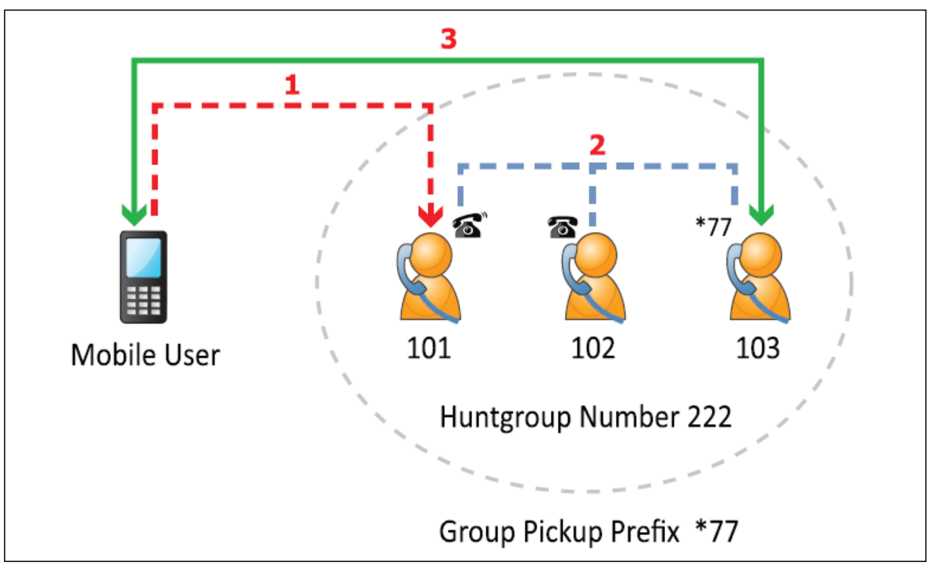


4. Click **Save** to add a specified time period for the current forwarding number.



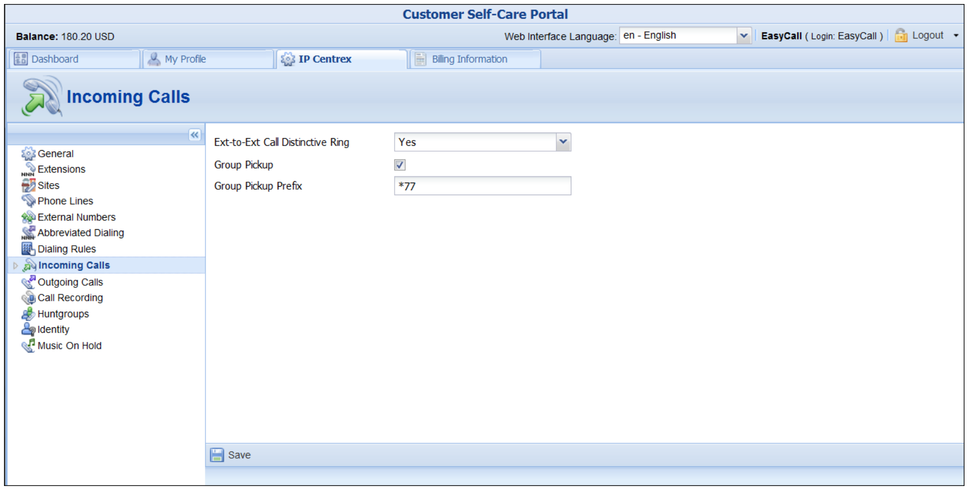
… Configure Multiple Pickup Groups?

The multiple pickup groups functionality allows phone lines in the same IP Centrex environment to be grouped so that phone line owners within the group may answer each other’s calls by merely dialing a Group Pickup Prefix on their phones.

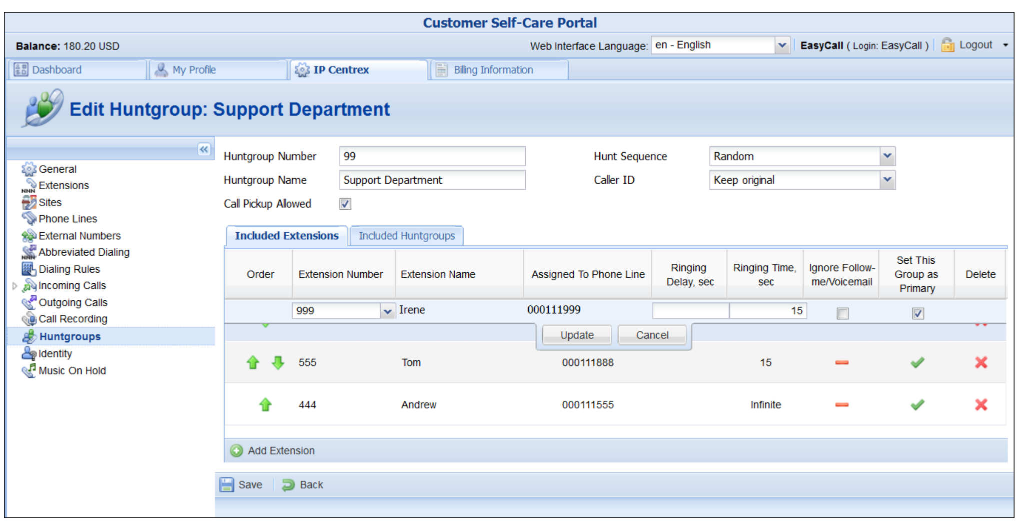


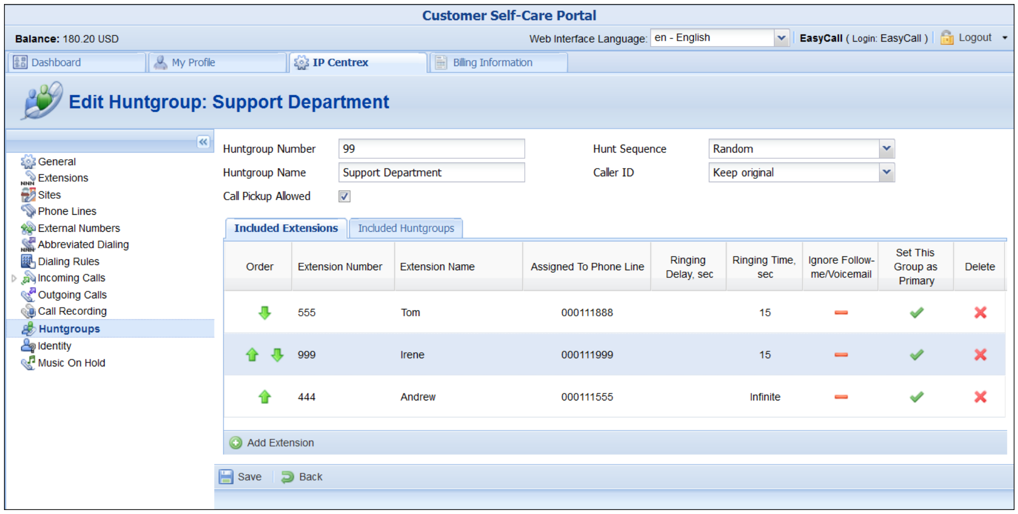
Let’s assume that there are two offices working with shared secretarial services. First you must enable a Group Pickup feature, then configure two huntgroups and lastly configure the pickup groups within them.

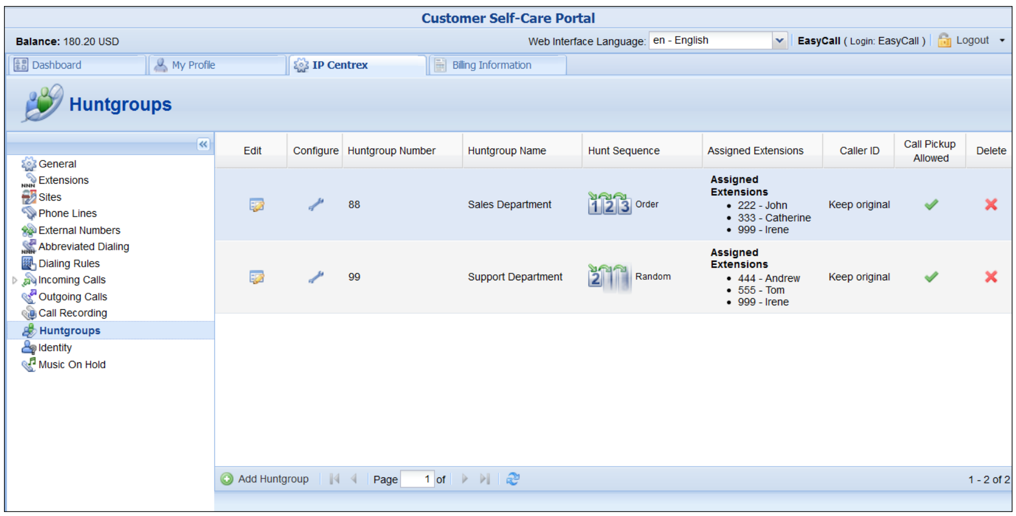
1. On the **IP Centrex** tab, select **Incoming Calls**.
2. To enable Group Pickup feature, select **Yes** from the **Group Pickup** list.



3. Select **Dialing Rules**. For your current dialing rule, in the **Service Feature Codes** area, in the **Group Pickup Prefix** box, type *77. Click **Save**.
4. Select **Huntgroups**, and add two huntgroups (for how to add huntgroups, see the section titled **Huntgroups**).
   - To the first huntgroup 88 (e.g. Sales Department) add the required extensions: 222, 333 and the secretary's 999 extension. Define huntgroup 88 as primary for extensions 222 and 333. Make sure the **Call Pickup Allowed** is enabled for the huntgroup.
   - To the second huntgroup 99 (e.g. Support Department) add extensions 444, 555 and the secretary's 999 extension. Define huntgroup 99 as primary for all these extensions – 444, 555 and 999. Make sure the **Call Pickup Allowed** is enabled for the huntgroup.







With these settings the following scenario is possible: There is an incoming call to extension *444*. The secretary (extension *999*) can dial **7788* to pick up the call (because *444* is in their non-primary group, thus **77* won't work. They have to dial the group pickup prefix and the number of huntgroup). To pick up an incoming call to the extension *222* the secretary can dial **77* because extension *222* is in their primary group.

… Top up a Service Wallet?

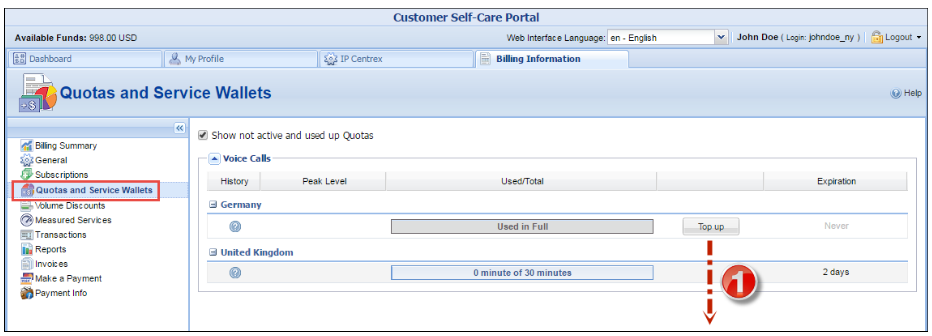
Service wallets make it possible to divide your balance into virtual sub-wallets. Each sub-wallet is designated for a specific service and destination group. Therefore, money transferred to a sub-wallet can only be used for a specific service (e.g. only for calls to the US or only for sending SMS, etc.).

For example, you want uninterrupted access to the Internet even if all of your available funds have been consumed by making calls. So either you top up your Internet service sub-wallet using a credit card or you transfer money from your main balance. You then receive a specific amount of Internet traffic that you can use even once your available funds reach zero.

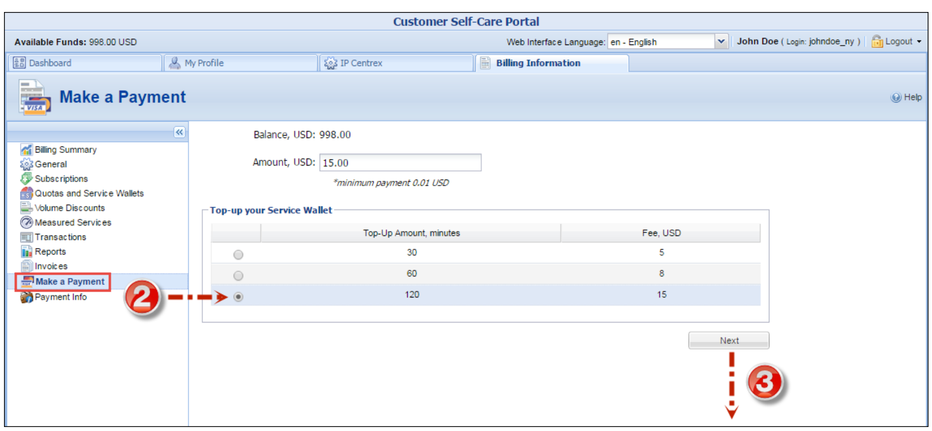
NOTE: If the **Top up** button is not available for you, please contact your service provider.

You can top up your service wallets on the **Quotas and Service Wallets** page in the **Billing Information** tab.

1. Select your preferred service and destination and click the **Top up** button.



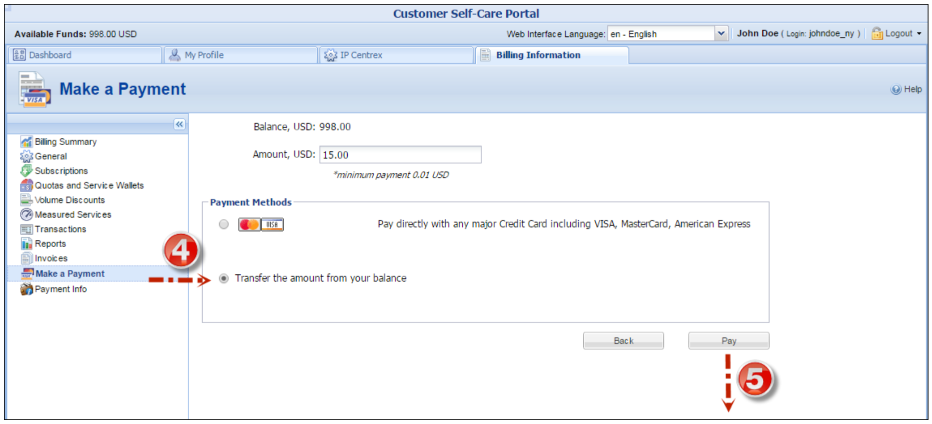
2. The system forwards you to the **Make a Payment** page. Here you can view your balance, the available top-up amounts and their fees. Select your preferred top-up option.
3. Click **Next**.



4. The next screen displays the available payment methods. Use them if you want to pay for the service by credit card. Please refer to the **Payment Info** chapter to obtain more information about how to configure online payments.

Alternatively, you can transfer money from your main balance. To do this, select **Transfer the amount from your balance** option located below.

5. Click **Pay**.



The next screen represents updated information about the service available for you.